

## ***GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD***

### ***Overview & Scrutiny Committee Agenda***

Date Thursday 21 March 2024

Time 6.00 pm

Venue Crompton Suite, Civic Centre, Oldham, West Street, Oldham, OL1 1NL

Notes 1. DECLARATIONS OF INTEREST- If a Member requires advice on any item involving a possible declaration of interest which could affect his/her ability to speak and/or vote he/she is advised to contact Paul Entwistle or Constitutional Services at least 24 hours in advance of the meeting.

2. CONTACT OFFICER for this agenda is Constitutional Services email [constitutional.services@oldham.gov.uk](mailto:constitutional.services@oldham.gov.uk)

3. PUBLIC QUESTIONS - Any Member of the public wishing to ask a question at the above meeting can do so only if a written copy of the question is submitted to the contact officer by 12 noon on 18<sup>th</sup> March 2024.

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MEMBERSHIP OF THE GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD

Councillors Al-Hamdani, Hince, Hobin, J. Hussain, McLaren (Chair), Moores, Surjan and Woodvine

Item No

- 1 Apologies For Absence
- 2 Urgent Business  
Urgent business, if any, introduced by the Chair
- 3 Declarations of Interest  
To Receive Declarations of Interest in any Contract or matter to be discussed at the meeting.
- 4 Public Question Time  
To receive Questions from the Public, in accordance with the Council's Constitution.
- 5 Minutes of Previous Governance, Strategy and Resources Scrutiny Board Meeting (Pages 1 - 18)  
The Minutes of the Governance, Strategy and Resources Scrutiny Board held on 25<sup>th</sup> January and 8<sup>th</sup> February 2024 are attached for approval.
- 6 Poverty Truth Commission (Pages 19 - 60)  
To receive an update and presentation on the work of Oldham's Poverty Truth Commission.
- 7 Performance Report - Quarter 3, 2023/24 (Pages 61 - 156)  
To scrutinise the Council's performance against agreed performance measures
- 8 Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3 (Pages 157 - 200)  
To scrutinise the Council's financial performance against the agreed Budget.
- 9 Work Programme (Pages 201 - 206)  
To consider the Scrutiny Board's work programme.
- 10 Key Decision Document (Pages 207 - 220)
- 11 Rule 13 and 14  
To consider any rule 13 or 14 decisions taken since the previous meeting.



**Present:** Councillor McLaren (Chair)  
Councillors Al-Hamdani, J. Hussain, Moores, Surjan and Woodvine

Also in Attendance:

Cllr A Shah	Leader of the Council and Cabinet Member for Reform & Regeneration
Cllr M Ali	Cabinet Member for Education & Skills
Cllr B Brownridge	Cabinet Member for Health & Social Care
Cllr P Dean	Cabinet Member for Communities & Culture
Cllr C Goodwin	Cabinet Member for Neighbourhoods
Cllr F Hussain	Cabinet Member for Business, Employment & Enterprise
Cllr A Jabbar MBE	Cabinet Member for Finance & Corporate Resources
Cllr S Mushtaq	Cabinet Member for Children and Young People
Matthew Bulmer	Director Education Early Years and Skills
Emma Barton	Deputy Chief Executive (Place)
Paul Clifford	Director of Economy
Neil Consterdine	Assistant Director Youth, Leisure and Communities
Andy Cooper	Senior Finance Manager
Nasir Dad	Director of Environment
Julie Daniels	Director of Children's Services
Jonathan Downs	Strategy, Partnerships and Policy
Paul Entwistle	Director of Legal Services
Rebecca Fletcher	Director of Public Health
Steve Hughes	Assistant Director for Strategy & Performance
Gerard Jones	Managing Director Children and Young People
Sarah Johnston	Director of Finance
Chris Kelsall	Assistant Director of Finance (Capital & Transformation)
Shelley Kipling	Assistant Chief Executive
Andrew Mather	Constitutional Services
Jayne Ratcliffe	Director of Adult Social Care
Lee Walsh	Finance Manager - Capital and Treasury

**APOLOGIES FOR ABSENCE**

There were no apologies for absence received.



2 **URGENT BUSINESS**

There were no items of urgent business received.

3 **DECLARATIONS OF INTEREST**

Councillor Surjan declared a non-prejudicial pecuniary interest in Item 7, Revenue Budget 2024/25 in relation to the funding of voluntary organisations.

4 **PUBLIC QUESTION TIME**

No public questions were submitted.

5 **MINUTES OF PREVIOUS GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD MEETING**

In relation to Minute 13 the Assistant Director of Finance (Capital & Transformation) reported that the reason that there had been no Board meetings for Oldham Economic Development Association (OEDA was that OEDA is a dormant Company and has been so for several years.

The OPP shares are nominally owned by Southlink Developments Limited. However, they are held in trust on behalf of the Council. Therefore the Council holds all beneficial interest. Whilst OEDA owns 100% of the shares in Southlink, it does not have any interest in the shares of OPP. This is important in relation to tax liability. Therefore, it is not proposed that OEDA has any part in the decision to sell the shares and importantly is seen not to have any part in it.

**RESOLVED** that the information in relation to minute 13 is noted and that the minutes of the meeting held on 14<sup>th</sup> December 2023 be approved as a correct record.

6 **REVENUE MONITOR AND CAPITAL INVESTMENT PROGRAMME 2023/24: MONTH 8 - NOVEMBER 2023**

**Introductory Statement**

The Cabinet Member for Finance and Corporate Resources made an introductory statement setting out the background and context for pressures faced in the current year and developing the budget for 2024. It had been an extremely challenging year with the Council facing an overspend of £16m. Particular pressures had resulted from Government policies, austerity, cost of living and benefit changes.

2024/25 would be the sixth year that the Government had made a one year final settlement making long term planning challenging. The Government had recently announced that a £500 million fund would be available for children's' services and social care but it was unclear what the authorities share would be or when it would be available. The Household Support Grant and Council tax Support Grant would end in March and no announcement had been made as to what funding would then be available.

In order to produce a balanced budget for 2024/2025 it was necessary to achieve savings of £22.8 m. In putting forward

proposals for cuts in services, increases in Council Tax, the uses of Reserves and increases in service charges the Administration was putting forward a balanced and robust budget

## **Report**

Consideration was given to a report of the Director of Finance an update on the Council's 2023/24 forecast revenue budget position at Annex 1 and the financial position of the capital programme as at 30 November 2023 (Month 8) together with the revised capital programme 2023/24 to 2027/28, as outlined in section two of the report at Annex 2.

The Cabinet Member for Finance and Corporate Resources and the Director of Finance presented the report and addressed enquiries of the Committee.

With regard to the Revenue position, The forecast outturn position for 2023/24 is a projected adverse variance of £16.194m after allowing for approved and pending transfers to and from reserves. There are significant variances contained within the projected net overspend within three areas forecasting pressures: Children's Services a pressure of £13.386m; Place and Economic Growth a pressure of £5.312m; and Community Health and Adult Social Care a pressure of £0.815m. The report set out action taken to address variances and take mitigating action. Favourable variances across the remaining portfolios totalling £3.318m are offsetting these pressures in these three areas.

The forecast pressure of £16.194m at Month 8 is an increase of £1.605m on the adverse position of £14.589m reported at quarter 2. Management actions that have been approved to review and challenge planned expenditure, control recruitment and to maximise income was hoped to have an impact on the anticipated outturn deficit position.

Information on the Month 8 position of the Dedicated Schools Grant (DSG), Housing Revenue Account (HRA) and Collection Fund was also outlined in the report. As previously reported, the position on the DSG continues to improve and as at month 8 it is forecasting an in-year surplus of £2.117m, with an estimate that the year-end position would be a surplus of £3.561m. Action will continue to be taken with the aim of mitigating cost pressures and delivering and maintaining a surplus position. To assist, Oldham is taking part in the Department for Education sponsored Delivering Better Value in SEND (Special Educational Needs and Disabilities) which will provide dedicated support for the SEND Review reforms to 55 Local Authorities with historical DSG deficit issues with the aim of putting the DSG of participating Authorities on a more financially sustainable footing There are currently no significant issues of concern in relation to the HRA. The Collection Fund is forecasting an in-year surplus of £0.805m. The Collection Fund is particularly volatile, whilst currently in surplus the position will continue to be closely monitored throughout the year as any surplus or deficit

at the end of the financial year will have a direct budgetary impact in 2024/25.



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In Relation to the Capital Budget the report outlines the most up to date capital spending position for 2023/24 to 2027/28 for approved schemes. The revised capital programme budget for 2023/24 is £78.633m at the close of month 8, a net decrease of £31.672m from the original budget of £110.305m. Actual expenditure to 30 November 2023 was £46.267m (58.84% of the forecast outturn). It is likely that the forecast position will continue to change as the year draws to a close with additional re-profiling into future years.

**RESOLVED:** that the Report be accepted and commended to Cabinet

1. Forecast revenue outturn for 2023/24 at Month 8 being a £16.194m adverse variance having regard to the action being taken to manage expenditure;
2. Forecast positions for the Dedicated Schools Grant, Housing Revenue Account and Collection Fund; and
3. Revised capital programme for 2023/24 and the forecast for the financial years to 2027/28 as at Month 8.

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#### **REVENUE BUDGET 2024/25 AND 2025/26 AND MEDIUM-TERM FINANCIAL STRATEGY 2025/26 THROUGH TO 2028/29**

Consideration was given to a report of the Director of Finance which provide the Overview and Scrutiny Committee with the budget reduction requirement and the Administration's budget proposals for 2024/25 and a forecast of the 2025/26 position having regard to the Provisional Local Government Finance Settlement (PLGFS) published on 18 December 2023. The report also presents the financial forecasts for the remainder of the Medium Term Financial Strategy (MTFS) period 2025/26 to 2028/29.

It was reported that the starting point for preparing the 2024/25 revenue budget estimates is the underlying base budget of £275.5m. The 2023/24 revenue budget forecast outturn position highlights a current unfavourable projected variance of £16.2m; which will need to be financed from reserves. This is in addition to the general contribution from reserves of £10.8m towards the 2023/24 budget approved by Council in March 2023, plus contributions from other earmarked reserves for specific projects/initiatives of some £7m. This means the total contribution from reserves in 2023/24 will be some £34m: a situation that is not sustainable and which has significantly reduced the financial resilience of the council.

A range of expenditure pressures had contributed to the budget gap. The main pressures arise from pay, expenditure on Council buildings, increased demand for services and rising prices for Children's Social

Care service provision and an increased demand for temporary accommodation.



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The report advised that the Council Tax position for 2024/25, was:

- The Council Tax Base is 59,380, up from 58,500 in 2023/24 and broadly in line with the position assumed in March 2023.
- A 2.99% increase in general purposes Council Tax increase is proposed together with a 2% increase for the Adult Social Care Precept.
- An increase of 4.99% would not require a Council Tax referendum as it would be within the referendum criteria issued by the Government in the PLGFS.
- The Council proposes to continue to provide no Council Tax Empty Property Discount and increase the Empty Property Premium from 1st April 2025.
- Total Council Tax to be generated for use by the Council based on the Tax Base and the 4.99% increase (including the adult care social precept) is £116.2m in 2024/25.
- No adjustment has been made to Council Tax levels for precepting Authorities or Parish Councils. Respective Council Tax levels for 2024/25 will be confirmed during January or February 2024.

Having regard to the proposed increase in Council Tax, Section 14 of the report presented the Administration's approach to balancing the budget for 2024/25 via the budget reduction process. There are a total of 34 proposals presented in accordance with Political Portfolios. These are expected to deliver savings totalling £11.0m and impact approximately 90 FTEs in 2024/25. The proposals would also have an impact on 2025/26 of £4.8m. The proposals were presented in summary at Appendix 4 and in detail at Appendix 5 of the report.

Assuming approval of the 2024/25 budget reduction proposals and taking into account the impact of one-off budget reduction proposals, the budget reduction requirement for 2024/25 reduces to £9.7m and 2025/26 to £11.5m.

The Committee examined the budget reduction proposals.

The Leader of the Council and Cabinet Member for Reform and Regeneration and The Director of Finance were in attendance to introduce the following proposals:

PEG-BR1-701 Capitalisation of Staffing Costs in Project  
PEG-BR1-729 Catering Service Review  
COR-BR1-731 Senior Leadership Team  
COR-BR1-732 Communications and Research Service Redesign

Referring to a question as to whether proposed changes to the Senior Leadership team would affect service delivery Members

were informed that the Chief Executive believed that a flatter management structure would not affect service delivery.



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The Cabinet Member for Finance & Corporate Resources was in attendance to introduce the following proposals:

COR-BR1-709 Efficiencies in Support services.  
COR-BR1-710 Exceptional Hardship Payment Scheme  
COR-BR1-711 Review of financial support and advice services  
COR-BR1-712 Reduction in Staff - ICT  
COR-BR1-713 Reduction in IT Application Services & Licensing  
COR-BR1-714 Reduction in Mobile Phone Savings  
COR-BR1-730 Centralisation of Business Intelligence functions  
COR-BR1-733 Reduction of corporate funding for Chief Executive Apprenticeships Programme  
COR-BR1-734 Introduction of a Vacancy Factor

The Cabinet Member for Health & Social Care was in attendance to introduce the following proposals:

ASC-BR1-715 Commissioning and Contracts  
ASC-BR1-716 Operational restructure  
ASC-BR1-717 Focussed Transitions Team – invest to save  
ASC-BR1-718 Assistive Technology  
ASC-BR1-719 Operating Model Implementation  
PHT-BR1-720 Reduce funding for sexual health provision  
PHT-BR1-721 Public Health Team

In response to questions regarding the potential

The Deputy Leader and Cabinet Member for Children and Young People was in attendance to introduce the following proposals:

CHS-BR1-706 Social Work and Children's Services Integration  
CHS-BR1-707 Children's Safeguarding  
CHS-BR1-708 Social Work Services

In response to Members questions regarding whether a reduction in the number of posts would be detrimental to service delivery Members were informed that a greater emphasis on early intervention and prevention would result in improved services.

Members also welcomed the opening of new children's homes in the district which would provide a better experience for children and reduce the costs associated with out of district placements. The Delivery Board would be monitoring the delivery of the children's homes.

The Cabinet Member for Education & Skills was in attendance to introduce the following proposals:

CHS-BR1-704 Home to School



## CHS-BR1-705 Staffing and Dedicated Schools Grant

The Cabinet Member for Neighbourhoods was in attendance to introduce the following proposals:

PEG-BR1-723 Public Protection Service Review  
PEG-BR1-724 Environmental Services - Service Delivery  
Changes to Parks and Cleansing  
PEG-BR1-725 Highways & Engineering Service Review

The Leader ( on behalf of Cabinet Member for Housing & Licensing) was in attendance to introduce the following proposal:

PEG-BR1-722 Strategic Planning and Information - Service Restructure

The Cabinet Member for Communities & Culture was in attendance to introduce the following proposals:

COM-BR1-702 Priority Programme  
COM-BR1-703 District Team re-organisation

The Cabinet Member for Business, Employment & Enterprise was in attendance to introduce the following proposals:

PEG-BR1-726 Get Oldham Working Service Restructure  
PEG-BR1-727 Get Oldham Working Delivery Model  
PEG-BR1-728 Strategic Investment - Reduced account management

With regard to a Members comments regarding Commissioning and Contacts Members were informed that it was no longer possible for the Council to fund services which were the responsibility of other providers.

**RESOLVED** that that the following recommendations be accepted and commended to Cabinet:

1. The policy landscape and context in which the Council is setting its revenue budget for 2024/25;
2. The financial forecasts for 2024/25 and 2025/26 having regard to the Provisional Local Government Finance Settlement and associated funding announcements;
3. The Flexible Use of Capital Receipts at a value of £2.6m for 2024/25 and 2025/26;
4. A proposed overall 2024/25 Council Tax increase of 4.99% for Oldham Council services (2.99% for general purposes and 2% Adult Social Care Precept) resulting in the charges set out at Table 12 of the report;



5. To approve the introduction of a 100% Council Tax Premium to be levied on empty properties and second homes from 1st April 2025 as set out in paragraph 9.34
6. The 2024/25 Budget Reduction proposals at a value of £11.0m with a further £4.8m for 2025/26;
7. The proposed use of £10.8m of reserves to balance the 2024/25 budget;
8. The proposal to draw on the Collection Fund for major preceptors of £137.0m for Borough Wide services and £116.2 m for Council services (subject to confirmation);
9. The proposed net revenue expenditure budget for 2024/25 for the Council set at £287.027m;
10. The proposed fees and charges as set out in the schedule included at Appendix 8;
11. The level of balances supporting the 2024/25 budget of £19.8m underpinned by the agreed policy on Earmarked Reserves;
12. The draft pay policy statement included at Appendix 10;
13. The delegation to the Cabinet Member for Finance and Resources and the Director of Finance to make a final decision on the feasibility of a pensions pre-payment if it represents value for money to the Council (Section 6.2-n).

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## **CAPITAL STRATEGY AND CAPITAL PROGRAMME 2024/25 THROUGH TO 2028/29**

Consideration was given to a report of the Director of Finance which sets out the Capital Strategy for 2024/25 to 2028/29 and thereby the proposed 2024/25 capital programme, including identified capital investment priorities, together with the indicative capital programme for 2025/26 to 2028/29, having regard to the resources available over the life of the programme.

The Council's Capital Strategy and capital programme are set over a five year timeframe. The proposed Capital Strategy and programme for 2024/25 to 2028/29 takes the essential elements of the 2023/24 to 2027/28 and previous years' strategies and programmes and moves them forward in the context of the financial and political environment for 2024/25. The Strategy look at those projects that are likely to run beyond the five year strategy. This covers a timeframe for the 10 years from 2029/30 to 2038/39.

The Capital Strategy was presented at Appendix 1 of the report. It was noted that The Strategy is aligned with the Creating a Better Place programme. This also incorporates the Medium-Term Property Strategy and Housing Strategy, aiming to deliver

its ambition in ways that contribute to a reduction in carbon emissions in support of the Council's Green New Deal strategy.

The Council has set out its capital programme for the period 2024/25 to 2028/29 based on the principles of the Capital Strategy. The Capital Programme and Capital Strategy are influenced by the level of resources considered available. As at the month 8 the anticipated capital expenditure over the five year life of the 2023/24 to 2027/28 strategy was £332.173m, taking 2023/24 aside (£78.633m) this leaves £253.540m for the remainder of the approved 2024/25 to 2027/28 capital programme. The capital programme includes proposed expenditure for 2024/25 of £99.683m of which the largest category is £83.226m of expenditure on regeneration, schools, transport and infrastructure projects within Place and Economic Growth Directorate. Total expenditure decreases to £81.076m, £34.838m, £35.640m and £2.000m in 2025/26, 2026/27, 2027/28 and 2028/29 respectively.

The report also set out the main sources of grant funding available to support the Capital Programme. The 2023/24 capital programme relies on £33.506m of ringfenced and £10.145m of un-ringfenced government grants. As in previous years, a major source of financing remains prudential borrowing. The amount required in 2024/25 (£49.638m).

There will be a continued review of capital spending requirements as the Council has further regeneration ambitions, but affordability and deliverability will be a key consideration in this regard. It is, however, possible that the capital position may change prior to the start of 2024/25 and during the year: Therefore, the overall capital programme position will be kept under review and any new information regarding funding allocations will be presented to Members in future reports.

**RESOLVED** that that the following recommendations be accepted and commended to Cabinet:

1. The Capital Strategy for 2024/25 to 2028/29 at Appendix 1 of this report and summarised at section 2.1 of the report.
2. The capital programme for 2024/25 and indicative programmes for 2025/26 to 2028/29 at Annex C of Appendix 1 and summarised at sections 2.2 to 2.6 of this report.
3. The Flexible Use of Capital Receipts Strategy as presented at Annex D of Appendix 1 of the report
4. The Minimum Revenue Provision (MRP) Policy Statement 2024/25 and method of calculation and Prudential Indicators detailed in Appendix 2 of the report

Consideration was given to a report of the Director of Finance which present to Policy Overview and Scrutiny Committee, the strategy for 2024/25 Treasury Management activities including the Minimum Revenue Provision Policy Statement, the Annual Investment Strategy and Prudential Indicators together with linkages to the Capital Strategy.

The Council was required through regulations supporting the Local Government Act 2003 to 'have regard to' the Prudential Code. It is required to produce an annual Treasury Strategy for borrowing and to prepare an Annual Investment Strategy setting out the Council's policies for managing its investments and for giving priority to security and liquidity of those investments. The Strategy for 2024/25 covers.

- Economic Update
- Prospects for Interest Rates.
- The Current Balance Sheet and Treasury Position
- Liability Benchmark
- The Borrowing Strategy
- Debt Rescheduling
- The Borrowing Strategy
- The Investment Strategy
- Approved Counterparties, risk management and Investment Limits
- Treasury Indicators which limit the treasury risk and activities of the Council

The report outlined the implications and key factors in relation to each of the above Capital and Treasury Management issues and makes recommendations with regard to the Treasury Management Strategy for 2024/25. The report included the most recently available economic background commentary which reflects the position at December 2023.

**RESOLVED** that that the following recommendations be accepted and commended to Cabinet:

1. Capital Financing Requirement (CFR) Projections as per paragraph 2.4.1 of the report.
2. Projected Balance Sheet position as at 31 March 2024 and future years as per paragraph 2.4.1 of the report.
3. Liability Benchmark as per section 2.5 of the report.
4. Borrowing Strategy for 2024/25 as per section 2.6 of the report.
5. Annual Investment Strategy as per section 2.7 of the report, including counterparties and treasury limits
6. Treasury Management Prudential Indicators at section 2.8 of the report.

## THROUGH TO 2028/29 AND PROPOSED OUTTURN FOR 2023/24



The Director of Finance submitted a report setting out the HRA 2024/25 proposed original budget and the forecast outturn for 2023/24. The provisional strategic budgets for 2025/26 through to 2028/29 were also presented.

HRA activities are a key element of the Council's Housing Strategy (approved by Council on 10 July 2019) which aims to provide a diverse Oldham housing offer that is attractive and meets the needs of different sections of the population at different stages of their lives. After taking all relevant issues into account, the projected financial position for 2023/24 is estimated to be a £0.032m favourable variance when compared to the original budget forecast for 2023/24 approved at the Budget Council meeting, 1 March 2023. Of this variance, £0.273m is due to higher utility costs and increased unitary charges. This adverse variance is offset by £0.305m higher than anticipated brought forward balances from 2022/23. The estimated balance at the end of 2023/24 is projected to be £20.884m.

The closing financial position for 2024/25 shows an estimated HRA closing balance of £19.571m which is sufficient to meet future operational commitments and the potential financial pressures identified in the risk assessment.

The 2024/25 position was presented after allowing for a proposed increase in dwelling rents of 7.7%, an increase in non-dwelling rents in line with individual contracts, a nominal increase of 2% on service charges and the setting of Extra Care Housing concierge charges to fully recover costs. The majority of HRA tenants are either the recipient of Housing Benefit or Universal Credit, meaning that part or all of the increase will be covered by tenant's benefits. Coupled with the recent increase in the Local Housing Allowance, it is assumed that the proposed increase in rents will not represent an unmanageable additional financial burden to tenants. In order for the Council to finance the construction of any new build social housing through the HRA, it is essential that increased costs are covered by rent increases so that the HRA can remain financially sustainable. The financial projections for the HRA over the period 2023/24 to 2028/29 show an overall reduction in the level of balances from £22.584m at the start of 2023/24 to £16.872m at the end of 2028/29.

Resolved:

1. The forecast HRA outturn for 2023/24 (Report Appendix A) be noted
2. The proposed HRA budget for 2024/25 (Report Appendix B) be recommended to Council.
3. The Strategic estimates for 2024/25 to 2028/29 (Report Appendix D) be noted.



4. The proposed increase to dwelling rents for all properties of 7.7% be recommended to Council.
5. The proposed increase to non-dwelling rents as per individual contracts be recommended to Council.
6. The proposal that service charges are increased by 2% be recommended to Council.
7. The proposal to set Extra Care Housing concierge charges to fully recover actual costs be recommended to Council.

The meeting started at 6.00 pm and ended at 8.15 pm

**Present:** Councillor McLaren (Chair)  
Councillors J. Hussain, Moores, Surjan and Sykes (Substitute)

Also in Attendance:

Al-Hamdani	Liberal Democrats Shadow Cabinet Member Finance and Corporate Resources
Councillor Quigg	Conservative Group
Sarah Johnston	Director of Finance
Chris Kelsall	Assistant Director of Finance (Capital and transformation)
Andrew Mather	Constitutional Services

1           **APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillors Al-Hamdani, Hince and Woodvine.

Note: Councillor Al-Hamdani had given his apologies in order to present a report to the Scrutiny Board.

2           **URGENT BUSINESS**

There were no items of urgent business received.

3           **DECLARATIONS OF INTEREST**

Councillor Surjan declared a non-prejudicial pecuniary interest in Items 6 and 7 in relation to the funding of voluntary organisations.

4           **PUBLIC QUESTION TIME**

No public questions had been submitted.

5           **LIBERAL DEMOCRATS BUDGET AMENDMENT PROPOSALS 2024/25**

Consideration was given to a report outlining the Liberal Democrat Budget Amendment Proposals 2024/25 which presented to the Scrutiny Board, the Liberal Democrats suggested amendments to the Administration's Budget proposals for 2024/25 and offered some forward-looking proposals to achieve savings in future years.

The Liberal Democrats Shadow Cabinet Member for Finance and Corporate Resources, Councillor Al-Hamdani was in attendance to introduce the report and answer questions. Councillor Al Hamdani thanked officer for their assistance in preparing the proposals but pointed out the difficulties caused by the short timescale of the budget process.

The Liberal Democrats Capital Investment Proposals proposed £2m additional capital investment required to deliver 'Investment in Our Districts' which would be financed by redeploying part of the Fund for Emerging Priorities included in the report 'Capital

Strategy and Capital Programme 2024/25 to 2028/29' considered by the Board on 25 January 2024. The proposed expenditure left a total of £7.426m remaining within the Fund and did not require any Prudential Borrowing and therefore neither added expenditure to the Capital Programme nor incurred any additional revenue expenditure in the form of capital financing costs.

The Liberal Democrats proposed a range of additional budget reduction proposals for 2024/25 which would make £0.311m available for investment with a further £0.139m in 2025/26 as detailed in Section 4 of the report. The resource would be used to invest in a range of proposals aimed at improving the lives of residents within the borough. Proposed additional investments included:

Highways and Pavement Repairs (£0.100m)  
Recreational and Green Spaces (£0.100m)  
Youth Services (£0.050m)  
Investment in Crime and Safety (£0.050m)  
Whit Friday Band Contest (£0.011m)

Budget reduction proposals:

- OPP-BR1-201** – Reconsideration of Council priorities with regards to the communications and Research Service (£0.365m)
- OPP-BR1-202** – Reduction in mileage budgets to reflect change in work practices (£0.055m)
- OPP-BR1-203** – Reduction in Trade Union Facilities Time (£0.070m)
- OPP-BR1-204** – Review of car allowances to reduce the amount paid as a lump sum to staff doing zero or minimal mileage (£0.050m)
- OPP-BR1-205** – Reduction in the Stationary Budget (£0.010m)

The report also suggested several areas for future consideration by the administration.

The Director of Finance in the role of Responsible Officer under Section 151 of the Local Government Act 1972 had evaluated the proposals and confirmed that the budget amendments as presented were robust and deliverable. However, as it was an alternative set of budget options the opportunity for testing the risks associated with the proposals are more limited and it is therefore necessary to afford a level of caution in presenting these alternatives.

**Resolved:**

1. That the following budget reduction proposals are accepted and referred to the Cabinet:



OPP-BR1-201 – Reconsideration of Council priorities with regards to the communications and Research Service (£0.365m)

OPP-BR1-202 – Reduction in mileage budgets to reflect change in work practices (£0.055m)

OPP-BR1-204 – Review of car allowances to reduce the amount paid as a lump sum to staff doing zero or minimal mileage (£0.050m)



2. The remaining budget proposals contained in the report be rejected.

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## **CONSERVATIVE BUDGET AMENDMENT PROPOSALS 2024/25**

A report was submitted presenting Conservative Group proposals for amendments to the Administration's Budget for 2024/25. Councillor Woodvine, Shadow Cabinet Member for Finance and Corporate Resources, had submitted a written introduction to the proposals as he was unable to attend the meeting. Councillor Quigg attended to answer questions from members of the Scrutiny Board.

Councillor Woodvine's introduction: Thanked Finance officers for their support in the production of the budget amendment proposals. Concurred with the Liberal Democrats that the tight turnarounds and timeframes had not allowed the Group to put together as rigorous proposals as they would have liked. The Conservative Group were proposing for the third consecutive year no increase in Council Tax for General Purposes. The Group accepted the Administration's budgetary reductions and unfortunately the use of reserves.

Councillor Woodvine reported that the Groups Budget is balanced and makes further budgetary reductions – these are in addition to those of the Administration and the primary reason for these is to counter the proposed increase in Council Tax for General Purposes. The report proposed an additional £1m to be taken out of reserves to fund the Council Tax freeze.

The proposed Budget reductions prioritised reducing non statutory staffing and service costs. Savings were proposed across: Executive Management; District Partnerships (but not including Council Ward Budgets); Communications; Administration and stationery; Elected Members' Allowances (Cabinet and Committee Chairs); and Mileage and car allowances.

The Conservative Group proposed abolishing the 'Big Bang Bonfire' and creating a fund for community events across the Districts including Christmas, Whit Friday and other events.

The report proposed reappropriation of funds for the Council's capital programme – this includes investing in the Royton and Shaw District Centres and a Saddleworth Health Centre. Priorities identified by the Conservative Group. Additional investment was also proposed for highways across the Borough.

Councillor Woodvine concluded that the priority of the Conservative Group was to keep taxation at the lowest possible level.

Details of the proposals were contained in Section 3 of the report and were summarized in Appendix One. Business Cases for the individual budget reductions were summarized in Appendix Two of the report.

The Director of Finance in the role of Responsible Officer under Section 151 of the Local Government Act 1972 had evaluated the proposals. The proposal not to increase the level of Council Tax for general purposes would significantly increase the budget challenge for 2025/26 and later years and as such must be considered a high-risk proposal given the financial pressures the Council will continue to face.

Councillor Quigg answered several questions from members on the proposals. Councillor Quigg again pointed out that difficulties were faced in obtaining information across all departments and that the Council's finances needed to be much more open and transparent to elected members and to the public, so they can access and engage with them properly

**Resolved:**

That the Cabinet be recommended to reject all of the recommendations of the report.

7 **GREATER MANCHESTER COMBINED AUTHORITY'S  
SCRUTINY COMMITTEE (GMCA) HELD ON 13TH  
DECEMBER 2023**

The Scrutiny Board received and considered the minutes of the meeting of the Greater Manchester Combined Authority Scrutiny Committee held on 13<sup>th</sup> December 2023.

Resolved: That the minutes be noted.

8 **WORK PROGRAMME**

The Scrutiny Board considered its Work Programme for 2023/24.

Resolved: That the Governance, Strategy and Resources Scrutiny Board's work programme 2023/24, be noted.

9 **KEY DECISION DOCUMENT**

The Board considered the Key Decision Document, which records key decisions that the Scrutiny Board has a duty to take.

Resolved: That the Key Decision Document be noted.

10

**RULE 13 AND 14**

There was nothing to report under Rule 13 and 14.

The meeting started at 6.00 pm and ended at 7.15 pm

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**Report to GOVERNANCE, STRATEGY AND RESOURCES  
SCRUTINY BOARD**

## **Update on Oldham's Poverty Truth Commission**

**Report Author:** Amanda Richardson, Policy Manager  
amanda.richardson@oldham.gov.uk

**21 March 2024**

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### **Reason for Decision**

Oldham's Poverty Truth Commission brought people with lived experience of poverty together with local leaders to address the underlying causes of poverty. This report provides an update following the completion of the PTC in the at the end of 2022.

### **Recommendations**

It is recommended that the report is noted, and further consideration given to support the ongoing work of the PTC through the Oldham Poverty Action Network (OPAN).

## Update on Oldham's Poverty Truth Commission

### 1 Background

- 1.1 Poverty Truth Commissions (PTC) are a national model pioneered by the Poverty Truth Network. They seek to identify different approaches to addressing poverty through direct experience, strong relationships, and humanising people as well as systems.
- 1.2 Oldham's Poverty Truth Commission brought together a dozen people with lived experience of poverty alongside a dozen people with power, influence or authority from across a range of council and health services, businesses and voluntary sector. Its aim was to better understand the causes of poverty, the challenges it presents both for the people experiencing it and the wider system - and identify ways to address these.
- 1.3 The PTC was formally launched in September 2021 with seed funding from the Joseph Rowntree Foundation and funding from Oldham Council and Oldham Clinical Commissioning Group. A copy of the PTC report is attached.
- 1.4 Modelling co-production from the start, colleagues at Shared Health and Action Together, Oldham's voluntary and community sector infrastructure organisation, worked for a year prior to the launch to recruit, support, and build the confidence and capacity of the lived experience commissioners to engage with and shape the PTC. This support continued throughout the process and was important for those commissioners still facing hardship and difficult circumstances, establishing relationships of trust as a solid foundation for their ongoing participation. The Council's Corporate Policy team similarly recruited and supported the engagement of the business and civic commissioners.
- 1.5 Over the next 12 months the PTC met regularly to define and address the issues they wanted to prioritise. Unlike many other PTC's Oldham focused on the identification of themes rather than specific target-driven projects, reflecting the commissioners' awareness of the need to tackle relational, structural and system barriers to achieve lasting change.
- 1.6 Three key themes were identified:
  - Welcoming points of contact: Services that have time to listen well and show understanding and empathy towards people who contact them for help.
  - Reducing stigma and raising hope: Helping to meet people's basic needs whilst also giving them opportunities to thrive and achieve.
  - Places of belonging, knowledge and hope: Places where people can belong to a supportive community
- 1.7 Embedding the 3 themes began whilst the PTC was still underway, the escalating Cost of Living crisis providing an opportunity to take forward "Welcoming Points of Contact". The grassroots commissioners co-designed and helped to deliver the borough's Cost of Living response, working alongside senior officers and customer-facing staff from a range of organisations at the Cost-of-Living Summit in July 2022, to produce an Action Plan to support residents through the winter.

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1.8 The Action Plan required all services and staff to adopt a strengths-based, trauma informed approach to supporting people in or facing crisis. The lived experience commissioners partnered with Council and Action Together staff to deliver face to face training to approximately 360 colleagues from a range of services and organisations. Going forwards, the Council is embedding a trauma informed approach across the workforce and an action plan is being developed to support this, led by Public Health.

1.9 Taking forward the theme of creating places of belonging, lived experience commissioners have attended Planning for Real events in each of Oldham's five districts, helping to identify key community assets as part of the mapping exercise to inform future decisions in relation to the place-based integration of services. It is intended that the district hubs are welcoming places where residents can get help, information and advice when they need it, make links to other services and access opportunities for learning and development

## 2 **Current Position**

2.1 Following the conclusion of the Commission in September 2022, work has continued to embed the PTC themes and lived experience at strategic and operational levels. Strategically, the Oldham Poverty Action Network (OPAN) has taken up the PTC mantle and, with a core of the PTC's grassroots commissioners, has drawn in more partners from across the public and voluntary sector, together with funding from the Local Motion group of national foundations. Facilitated by Action Together three task groups have been established to make progress on their shared areas of work which continue to translate the PTC themes into action.

- 1) Building out from the cost-of-living response
- 2) Hope and aspirations: creating routes out of poverty
- 3) Building a joined-up approach to poverty alleviation & prevention

2.2 With a budget of £100,000 from Local Motion OPAN is able to test out ideas and develop proposals for longer term funding.

2.3 **Task Group 1** is focused on continuing the development and roll-out of the Oldham Community Advice Network, an online referral tool that brings together a range of crisis support providers and organisations in one system to ensure that residents who need help can access it easily and quickly, without having to re-tell their story. The system enables providers to indicate when they are at capacity so that residents can be re-directed for support elsewhere in the system.

2.4 **Task Group 2** is currently focused on developing a model of volunteering which will 'reclaim volunteering for people experiencing hardship' and begin to operationalise routes out of poverty using a strengths-based approach. The aim is to recognise the ways people in poverty often already participate in their communities and build on these strengths as a route out of spiralling hardship - whilst also improving their own skills, health and wellbeing. OPAN have recently recruited a Volunteering Officer with lived experience to work alongside clients and work coaches in Oldham Job Centre to advise on volunteering pathways as a way of accessing further training and employment

2.5 **Task Group 3** Continues to take forward the work of the PTC at a system level, building on the strategic links made by the lived experience commissioners through their engagement in the Planning for Real exercises and their direct engagement in the production of the Oldham Plan, the Council's Corporate Plan and other key strategies such as the Health Inequalities Action Plan. Currently members of OPAN are engaged in the development of the Oldham Systems Conditions Forum. The Forum is a newly

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created space to explore and tackle system conditions that are preventing people moving out of poverty, involving people with lived experience equitably alongside system partners.

### 3. **Next steps**

- 3.1 Work continues to take forward the Task Groups through monthly meetings which are also attended by officers of the Council. This ensures that the Council continues to support the delivery of the workstreams and learns from and embeds co-production into its policy and practice. Action Together provide updates as appropriate regarding the work of OPAN to the Public Service Reform Board.
  
- 3.2 The lived experience commissioners remain supported by Action Together and Greater Manchester Poverty Action. Many of the individual Commissioners have and continue to experience positive outcomes from engagement with the PTC and OPAN through for example, volunteering, accessing employment or feeling more settled and supported to navigate the challenges they may still experience.

Their voices can be accessed through this link.

[https://youtu.be/Ad7h\\_oiBktM?si=GM7SqEbu-4gXK3S7](https://youtu.be/Ad7h_oiBktM?si=GM7SqEbu-4gXK3S7)

### 3 **Appendices**

- 3.1 Oldham Poverty Truth Commission Report  
PTC presentation slides



# Oldham Poverty Truth Commission Report

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- 2. Overview of journey
  - Who we are
- 3. What is a Poverty Truth Commission?
- 5. Stage 1: Forging the Commission
- 7. Stage 2: Launch
- 10. Stage 3: Building relationships, uncovering truths
- 13. Stage 4: Reaching conclusions
- 17. Stage 5: Achieving our ambitions - and sharing them
- 22. Stage 6: Learning from our Commission

# Overview of the journey

One of our Grassroots Commissioners introduces themselves by saying they've 'been a commissioner for five years'. That's because although the Commission only launched officially in 2021, there was a long journey preceding it.

From that point in the mists of time when they and a few others first heard about the Poverty Truth approach, looked at each other and thought "that's what we need to do, isn't it?", there have been some huge individual journeys and some major strategic/system ones. In this report, we hope to capture the stages of those journeys, from early recruitment and development through launch, relationship building, reaching conclusions and then realising them.

At one point we intended this to be a 'Manifesto for Change', making the case for doing things differently in Oldham. This no longer feels necessary, because the change is happening. Instead, we hope this report can stand as a record of how we want it to be different, of how getting there *can* be done differently, and a *reminder* of these principles whenever the journey gets hard.

## Who we are



**Front row:** Simon Carrigan, Aisling Bouketta, Kashif Ashraf, Ronni Hall, Lynda Smith, Mandy Ugbomah, Nadia Masood, Shanaz Siddique, Elaine Morgan, Lisa Williams

**Back row:** Marian Chidziya, Sayyida Bano, Jo Spurling, Robbie Cowbury, Caroline Lee, Diane Baxter, Richard Lynch, Rebecca Sutcliffe, Dave Wilkinson, Anna Pratt, Amjad Karim, Vaughan Gannon, Andrew Gregori

**Not pictured:** Yaasmin Mughees, Colin McLaren, Cath Ball, David Garner, Amanda Richardson, Bill Lovat, David Austin, Mahmuda Khanom

# What is a Poverty Truth Commission?

The first Poverty Truth Commission was launched in Scotland in 2009. Hosted by Faith in Community Scotland, it grew out of a belief that the wisdom, experience and understanding of people who struggled against poverty was vital in making decisions about poverty. So, on a Saturday afternoon in Glasgow City Chambers, 15 people stood and told stories of their struggle against poverty through drama, dance, speech and poetry. There was laughter, hope and a recognition that whilst life had been tough, they were still standing. The audience of 400 people included 15 leaders from within public life in Scotland. As they reflected on what they had just seen, these leaders acknowledged that if positive change was to be made, they needed to work with those whose stories they'd heard over the coming months.

The first outside of Scotland took place in 2014 in Leeds, and since then 30 locations (and counting) have started on their own journeys. Poverty Truth Commissions seek to discover the answer to the question, 'what if people who struggled against poverty were involved in making decisions about tackling poverty?' The basic structure follows that original model in Scotland: half of the commissioners are people with a lived experience of the struggle against poverty, the other half are leaders within the city or region. Collectively they work to understand the nature of poverty, what are some of the underlying issues that create poverty and explore creative ways of addressing them.

The commissioners for each Commission comprise two groups of people. Around half of the commissioners are people with a lived experience of the struggle against poverty. The other half are leaders within the city or region. Collectively they work to understand the nature of poverty, what are some of the underlying issues that create poverty and explore creative ways of addressing them.

Oldham first started exploring the possibility of hosting its own Commission in 2018. With seed funding from the Joseph Rowntree Foundation, Action Together took on responsibility for hosting and pulling it together. After years of discussions (and a global pandemic), further funding from Oldham Council and the local Clinical Commissioning Group helped the project begin in earnest in 2020. Action Together continued project managing, with local charity Shared Health coming on board to support the grassroots commissioners, and Oldham Council's Corporate Policy Team taking on responsibility for recruiting Civic Commissioners. Along the way, we've benefited from exceptional support from the Poverty Truth Network, as well as others including Church Action on Poverty and Galleries Oldham, who have hosted all our get togethers.

With special thanks to



# Timeline



**2018**

Idea for the Poverty Truth Commission first discussed as part of 'Pies the Limit' lived experience project.

JRF seed funding for Action Together to develop the Commission.



**Sept 2020**

Funding secured with support from Local Authority and local NHS. Facilitation team expanded.

Commissioner recruitment and lived experience sessions begins.



**May 2021**

Small group work for grassroots commissioners focused on unpacking stories.



**Sept 2021**

Commission officially launches, with monthly gathering to get to know each other, understand each other's perspectives, and build ideas about how to change the story of Poverty in Oldham for good.



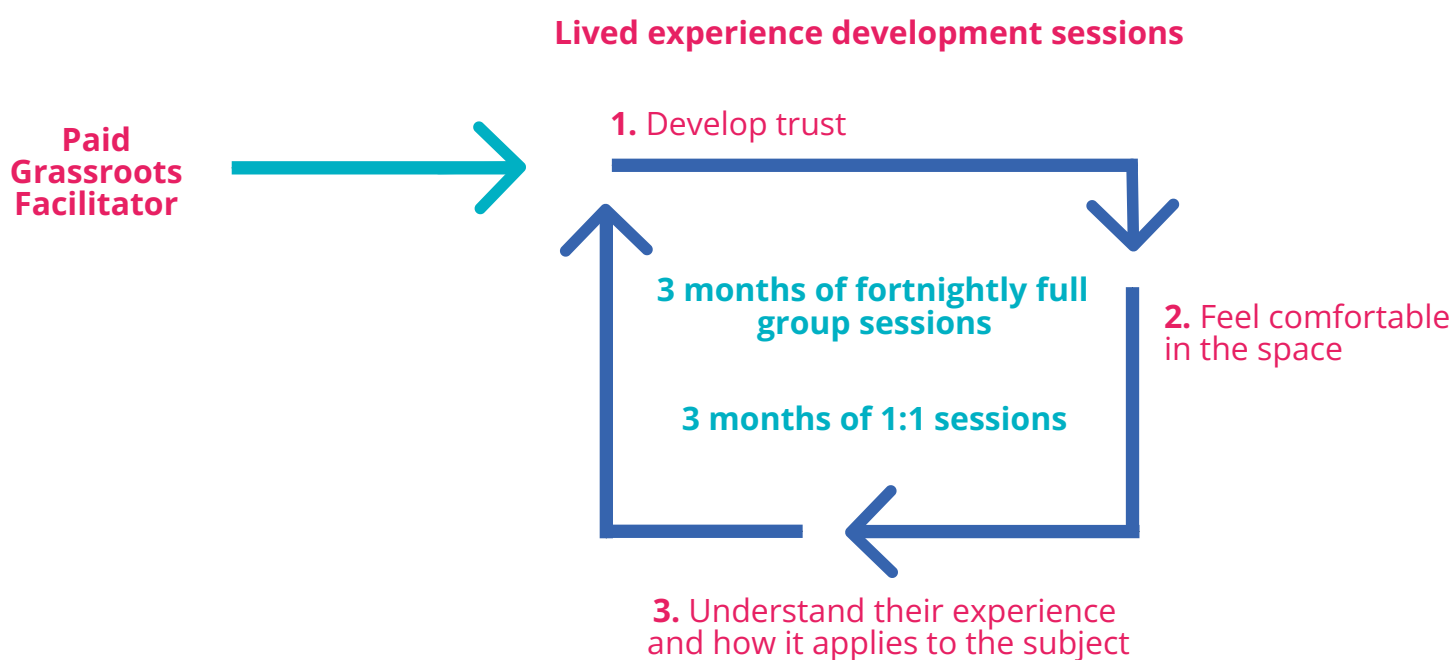
**Sept 2022**

Last formal Commission meeting and 'landing our themes' period starts.

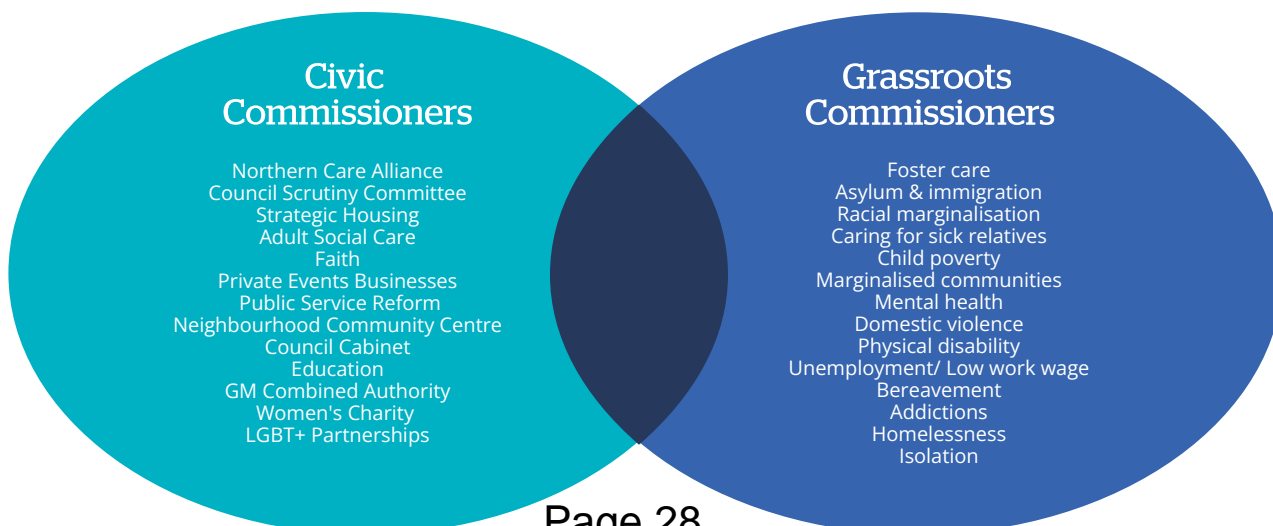
# Stage 1: Forging the Commission

Of the overall total Oldham PTC budget, a third went toward Grassroots Commissioner support, provided by Greater Manchester charity Shared Health Foundation. Of the 2 ½ years since agreement was reached to launch the Commission, a full year went into recruitment and development of Grassroots Commissioners. This was intentional and essential for creating the foundations of what came after, and without it what was built would not be worth it.

## Model of co-production prior to launching the Commission:



## What perspectives and experiences did our Commissioners bring with them into the space?



## How did our Commissioner's define poverty?

'if you do something they come down on you in a flash. if they do something it's not acknowledged.'

Normalising hardships

'It was normal to sleep in train stations... to turn up to work with suitcases.'

Afraid to come out

Access

Loneliness

You end up making excuses to protect your loved ones

An everlasting scar

Abuse

'People say, "you know where we are if you need us", but you don't go because you're scared.'

'Most people don't think "I'm poor".'

Hitting rock bottom

Isolation

Pressure

Knowledge

Power

Money

People come around and you don't know if they are for real or exploiting you

## Testimony: What role did the Commissioner development sessions play in the overall project?

During our Poverty Truth journey we set aside time to gather the Grassroots Commissioners together, outside of the full sessions, for peer support and personal development. These were really important times where relationships were cemented and deepened and where themes and issues could be explored more fully in a supportive environment. These sessions often involved coffee, cake and piles of toast!

We recognised that while we were trying to tackle key issues around poverty, many of our lived experience members were still dealing with these issues on a daily basis, and that some emotional support and a safe space to be open was really important. In addition, members were able to sign post each other to support and some even stepped into new volunteering opportunities encouraged by their peers.

The Grass Roots Commissioners all benefited from these times and at the end of the process many commented that the support and friendship from their peers was a key part of their personal growth journey.

Jo Spurling,  
Grassroots Facilitator Shared Health Foundation



## Stage 2: Launch

The Launch of Oldham's Poverty Truth Commission was designed with the Grassroots Commissioners in order to embrace co-production from the start and set the tone for the Commission. A few features different to other events or Commission launches were included as a result:

- 1) Only Commissioners and the Facilitation Team were invited, with the sole aim of building relationships and understanding. Unlike in other places, members of the public were not invited to be involved at this point.
- 2) Civic Commissioners were explicitly welcomed into the space set up by Grassroots Commissioners, via physical invites from a specific person, who met them at the door and sat next to them at their table.
- 3) Attendees were asked to think about what they wanted to change, in order to change the story of poverty in Oldham for good, but not to draw any conclusions on the day.

How did the experiences shared at the launch make the attendees feel?





## What are we asking to change?

Attendees were given a piece of card to scribble down their draft of what they were asking to change. This was pitched as a draft so that people didn't fix on one answer, but started out with an idea which could then be shaped by the journey the Commission would take them on.

"How people we come into contact with treat everyone with respect and are trauma informed."

Greater understanding of how poverty effects people and so real life. Greater determination to tackle it together.

Children and young people have access to the same opportunities as those from other areas.

Preventative – before crisis – where to get help? (Professionals and volunteers need to **talk**.)

Better care for those experiencing poor mental health; Get better at being able to recognise red flags; more support for mothers during/after labour.

Lived experiences voices have a place in spaces where decisions are made – **all** the time.

To find how best to support Oldham's citizens to be the best they can be.

The way we think about our town and the people who live there.

Everyone in Oldham has somewhere to go for help. Improving the system of supporting people who are struggling by understanding their experience and needs better.

Change the wider system to reduce inequalities and bring everyone on the journey.

To have a plan (solid, achievable) to combat poverty long term that's sustainable, that involves community, private and public sector.

Perception of poverty, of symptoms and causes of poverty, solutions available to eradicate it, strategies and policies we can adapt as recommendations.

Help people to get the right help at the right time.

To prevent suffering and create success.

Important to change the way we view how other people live their lives.

Decision making: strategic, central, individual.

Opinions on poverty: the understanding of what 'poverty' means

Policy making and practicalities.

# Case Study - Lynda

Lynda chose to depict her story as a series of steps forward and steps back. With the help of another Commissioner, Simon, she drew big placards which summarised each step. To involve them in the story, Lynda invited a Civic Commissioner to join her at the front and hold the relevant placard. She gathered props from throughout her life to use for extra effect at selected moments.

## STEP 1

### Looking to the future

I began my journey in December 2018. I was able to start afresh when my marriage broke-down. Being in the marriage was stressful, my ex-husband controlling my finances and behaviour.

## STEP 2

### Surfing between two temporary homes

I went to live between my daughter in Lancashire and my sister in Yorkshire. I moved every two weeks. I had my own room at my sisters, but at my daughters I was in my 10 year old granddaughter's bed while she went in with her mum.

## STEP 3

### Reaching new heights, discovering new layers

In Feb 2019 I went to live in an all-women's refuge, where my new life began to change. I grew with enthusiasm toward new activities. My support worker introduced me to Inspire Women Oldham and to the Threshold Peer Mentoring course. Achieving my certificate at the Celebration Event in June 2019, with new friends present, made me feel such achievement and camaraderie.

## STEP 4

### Three blind mice

I was offered the next step forward and moved into a bedsit in June. The first night people were fighting, I could hear furniture and stuff being thrown. I felt like leaving there and then, and called my support worker who convinced me to stick it out. I did, but I never felt comfortable and I didn't feel safe. I killed three mice in total before finally, I had enough.

## STEP 5

### I'm home, Dad

A friend invited me to move in with her instead. From my back window, I looked out at the fields that we used to play on as a child. At the bottom of our road was the primary school I watched them build from the ground up. Being "back home" brought back loads of memories, which made me feel close to my family that are no longer here.

## STEP 6

### "I want her out of my house"

While I was there, the Pandemic hit. My courses stopped, my volunteering stopped, and it affected my mental health. My friend tried to help, but was also suffering with illness herself. We made each other worse, and things deteriorated. Toward the end, she was on the phone to Housing, who asked her if I could stay. I heard her say: "No, I want her out of my house". I went upstairs, packed my backpack, grabbed a hold-all full of knitting gear, a carrier bag with shoes in, put the key on the side and left.

## STEP 7

### "Learn from your mistakes"

A friend I'd met in the refuge before, along with a support worker I was still in touch with, helped me get into new temporary accommodation with De Paul.

## STEP 8

### Dreamed it, believed it, achieved it

I did it. I left De Paul with 30 reusable shopping bags, 1 suitcase, 1 backpack, 1 TV, 2 lamps, and countless certificates demonstrating everything that I have achieved. If I hadn't decided to leave my marriage, I wouldn't have had to surf between two homes every two weeks; I wouldn't wait three years until I had my own home; I wouldn't have become a mouse murderer; and I wouldn't have fallen out with friends. I would also not have managed to achieve my goals, meet all these people and be involved with all these wonderful groups and support systems. Where I am now, I get on with all my neighbours. I use my Peer Mentoring with several different groups. I am a Poverty Truth Commissioner.



# Stage 3: Building relationships, uncovering truths

Having established the basis for how we wanted to work together and operate our Commission, we set about exploring each other's perspectives and seeing what ideas and themes floated to the top. These notes outline some of the key questions asked and points shared in the sessions from October to December 2021.



## Session 2 - Focus

- Understanding who we all are
- Assumptions

## Quotes

- "These scars can never be removed."
- "Nowhere does it say 'click here if you are struggling'."

## Key Takeaways

- Stigma of accessing support
- Early intervention vs crisis intervention?
- Simplicity of system vs personalised support
- The system is also frustrated that it can't make more of an impact
- Auditioning for entitlement: Does system want people to be eligible?
- Design system around people likely to be accessing
- Scale of solutions to reconnect us to our tribe



## Session 3 - Focus

- Going deeper
- What would we tell others about the Commissioner's work

## Quotes

- "All the quality analysis is limiting the quality."
- "The system does not give people the time to care."
- "How can we change whilst being overwhelmed."

## Key Takeaways

- Don't forget the 'ladders' and 'sliding doors'
- Support providers don't feel trusted and aren't respected
- Can't only deal with the first issue that presents
- Reflection and understanding vital components of acting
- Precariousness of the system limiting it's ability to respond properly



## Session 4 - Focus

- What do we want to change?
- Can we change it?
- How do we change it?

## Key Takeaways

- Multiple parts to addressing stigma
  - Making more positive opportunities available
  - Benefits/ state support - an entitlement; people should feel able to access, not like a burden
- We have our own real limits to system capacity here in our Commission. What can we learn from this?
- When the system collaborates, it needs to make sure others aren't treated like 'second class citizens'
- Lots of other great stuff going on in Oldham that we need to get about (or duplicate)

By the December, two themes had started to come up again and again, and two reflections were making themselves really clear to attendees:

## 1) Themes

Emerging Theme	What do we mean by this?	What might be within our control?
<b>Stigma &amp; Understanding</b>	Importance of understanding of poverty (and how it affects people) as a major way to assist people in dealing with its impact and reducing stigma.	'Co-location' of positive and negative support offers and messages: use of Community Centres, strengths-based comms e.g. 'YOU ARE ENTITLED' campaign; arranging positive activities that support people's dignity and humanity to do more than 'chase the debt away' type crisis support. Fewer means tested programmes (which come with stigma), presented as for everyone and in all places E.g. replicating social support approaches in most deprived schools as default in all. Encourage participation in offers which are there (such as school clubs and activities).
<b>Emotional Intelligence</b>	Significance of approach taken by social support systems when people first reach out for help. This is crucial to responding appropriately to where the person is/how they are likely feeling at that time, and looking beyond the immediately presenting issue which is rarely the only source of difficulty.	Provide input to the Health Inequalities strategy to think about accessing services (this opportunity has come about through some other networks and could be a great way to influence wider Oldham work).  Workloads and time for reflection amongst front line staff.  Listening more effectively to 'customers' - provide training, recruit for empathy.

## 2) Reflections

### i) Precariousness of the system

*Systems of social support are increasingly unable to provide the conditions in which an adequate response can be offered to people or sufficient investment provided to develop the skills and capacity need to resolve challenges, even when there is a great desire to do so.*

We started with 14 Civic Commissioners and 13 Grassroots. By the time of our 'mid point review' in February, 50% of our Civic Commissioners had left or had to substitute in someone else.

The reasons for this turnover were very valid and beyond the control of the PTC:

- Taking on a more senior role due to the departure of the previous post-holder
- Leaving the organisation on long-term sick leave
- Taking a new role in a different locality following Senior Leadership Changes (x2)
- Too much going on in the day job (x3 - one private sector, one VCSE, and one NHS)

This was a tangible demonstration of what was emerging in discussions about social issues contributing to poverty: the people and services that were trying to reduce poverty and its impacts were too stretched, too burnt-out, too under-resourced, to do so effectively. Happening soon after the COVID-19 pandemic, amidst ongoing lockdowns, and a decade of reductions to Council budgets imposed by national Government, this was even more the case while our Commission was meeting.

In so many instances, not being able to do things wasn't about will, it was about capacity.

ii) Co-producing responses

*The Commission was uncovering the instability at the core of Oldham's social support, but it was also discovering a method to fix it; an opportunity to test out a really high-spec model of co-production between professionals and people with lived experience.*

We could see and feel this working effectively, especially when it came to creating equal power relationships, high quality non-judgemental discussions on all sides, and shared understanding of the issues.

A blueprint was emerging which could be applied to help other initiatives and spaces in Oldham better involve residents and be co-produced. They would involve an investment of time, resource, preparation, and adaptability to different people's requirements – all of which the precariousness of the system makes hard to deliver. But we were coming to a conclusion that this investment would be far smaller than the ongoing cost of failing to include people who've experienced a social issue in the efforts to address it.

**Testimony: What role did the relationship building part of the process play in the overall project?**

The "building a relationship" part was very important. We as grassroots commissioners were being paired with one civic commissioner, and getting to know them on a personal level was quite fundamental because how many of us knew any of the civic commissioners on a personal level? Did we ever get a chance to know people who are sitting in big offices, and who are an integral part of the system? Not saying that the lived experience members are not.

Those relationships are still going strong as we still get to see those commissioners involved with other ongoing projects to deal with poverty. We see the empathy in them, and the longing to help people in difficult circumstances, which has been our aim in the PTC Oldham.

Yaasmin Mughees,  
Grassroots Commissioner



## Stage 4: Reaching conclusions

With our ideas starting to crystallise, we took a break from regular meetings in February, and instead scheduled some 'one off' sessions focused on short-term issues to see how they could be applied.

Doing so helped us settle on three final themes which would shape the rest of our Commission:



### Welcoming points of contact

Services that have time to listen well and show understanding and empathy towards people who contact them for help



### Reducing stigma and raising hope

Helping to meet people's basic needs whilst also giving them opportunities to thrive and achieve



### Places of belonging, knowledge and hope

Places where people can belong to a supporting community

Over the subsequent months, we unpacked what was meant by each of these and what we might be able to do with them. We identified a full A-Z of things we could try and get started, and we invited others to join us with a big event in July 2022 with 60+ attendees from across the Oldham System and gathered pledges. We argued, and we joked, we voted and we mapped.

The system wasn't any less precarious, and with fewer Civic Commissioners we had fewer connections to places where decisions could be made. The Cost of Living Crisis was becoming increasingly relevant, its impacts felt by the Poverty Truth Commissioners and more broadly across Council and other services as residents' demand for urgent support increased.

We found ourselves caught between the urgent and the long term.

Laser focus on people in the most desperate circumstances



Interacting with people in the right way, all the time



**Spotlight: Cost of Living Summit and video for Oldham Council**

With concerns about the Cost of Living mounting, Oldham Council organised an all day 'Summit' with a range of key partners, to consider what the response could be to support residents over the winter that year ( winter 2022/23 ).

Three of the Grassroots Commissioners, Simon, Mandy and Andrew, were invited to speak to Summit and frame the challenge based on learning from the Commission. Each of them took a theme, sharing 1) what is meant by this? 2) how does it relate to your experience? 3) how can the audience apply this to what they do?

	<b>Point of Contact (Simon)</b>	<b>Stigma &amp; Hope (Mandy)</b>	<b>Places of Belonging (Andrew)</b>
<b>1) What is meant by this?</b>	It's traumatising to make contact with someone and tell your whole story when you are struggling.	The real crisis for people is often the lack of hope or belief, and its this that makes it stigmatising.	We need local hubs where people can go not just if they have something specific they need, but to be and feel like they belong.
<b>2) How does it relate to your experience?</b>	The right contact, trusted and effective, can become therapeutic and open up so many doors.	The most effective interventions don't just offer crisis support and then sweep people under the carpet, but help people do things themselves, be involved in something bigger and believe there's a life beyond the crisis.	These should have the information about specific offers of support, so that when people do want to access its easy for them.
<b>3) How can the audience apply this to what they do?</b>	As we make more contacts through the Cost of Living crisis, these need to be effective ones.	Our cost of living interventions can't be limited to crisis support, but must offer hope and positivity to avoid stigma and result in long term change.	The more effort we put into making Cost of Living offers available through hubs like this, the more effective they will be.

Following on from this, Andrew plus Nadia and Yaasmin from the Commissioner team recorded a video describing the themes in their own words for the Oldham Council Heads of Service meeting and Executive Leadership Team.

You can watch the video online at: <https://youtu.be/ZPRXtdhC5dw>



We also found ourselves getting invited to more and more other activities, like the Cost of Living Summit, and realised that the focused work was happening, and would continue to happen elsewhere. Our message about how to work together to change the story of poverty in Oldham for good was being picked up elsewhere.

We concluded that our Commission needed to take action on two fronts:

1) Focus our attention as the Commission on *how* things should happen, encouraging everyone everywhere to keep these in mind as they went about their roles with their particular focus.

If these three things were achieved across the social support system, we would have the best chance of changing the story of poverty in Oldham for good.



**Theme 1:**  
Welcoming points of contact

**What?**

Look at presenting issue to understand root causes when first making contact with public/ support and reduce how much people have to tell their story.

**Why?**

"I don't get one-size-fits-all shoes. There's a reason for that."

**How?**

- Adoption of common 'triage' approach for public facing agencies which meets the person's needs first, agency's second (co-produced with people who have experienced hardship)
- Public commitments from public points, train and use named lead in each team for promoting this way of working
- Commitment from senior, political and strategic leads to suspend output targets for teams who are testing it.



**Theme 2:**  
Reducing stigma and raising hope

**What?**

Help cultivate belief and hope when providing crisis support by offering people the chance to be involved in positive things and recognise the differences they make in their community as leaders, carers or through their everyday lives.

**Why?**

"A little bit of hope changes everything."

**How?**

- Support 'Voluntary apprenticeships' for non-paid roles to build confidence and understanding
- Develop an 'Oldham Community Leadership Award' that officially recognises efforts people have put into their lives and communities
- Encouragement from employers to recognise this in their recruitment
- Peer support offer for people who have used crisis support (from others who have made use of it)



**Theme 3:**  
Places of belonging, knowledge and hope

**What?**

Get agencies and support staff out of isolated offices into shared community bases, from which they are closer to the actual places where people go, so it is easier for people to find out what support is available and make use of it.

**Why?**

"Residents don't trust people in offices, shirts and ties. To have trust, officers need to be seen."

**How?**

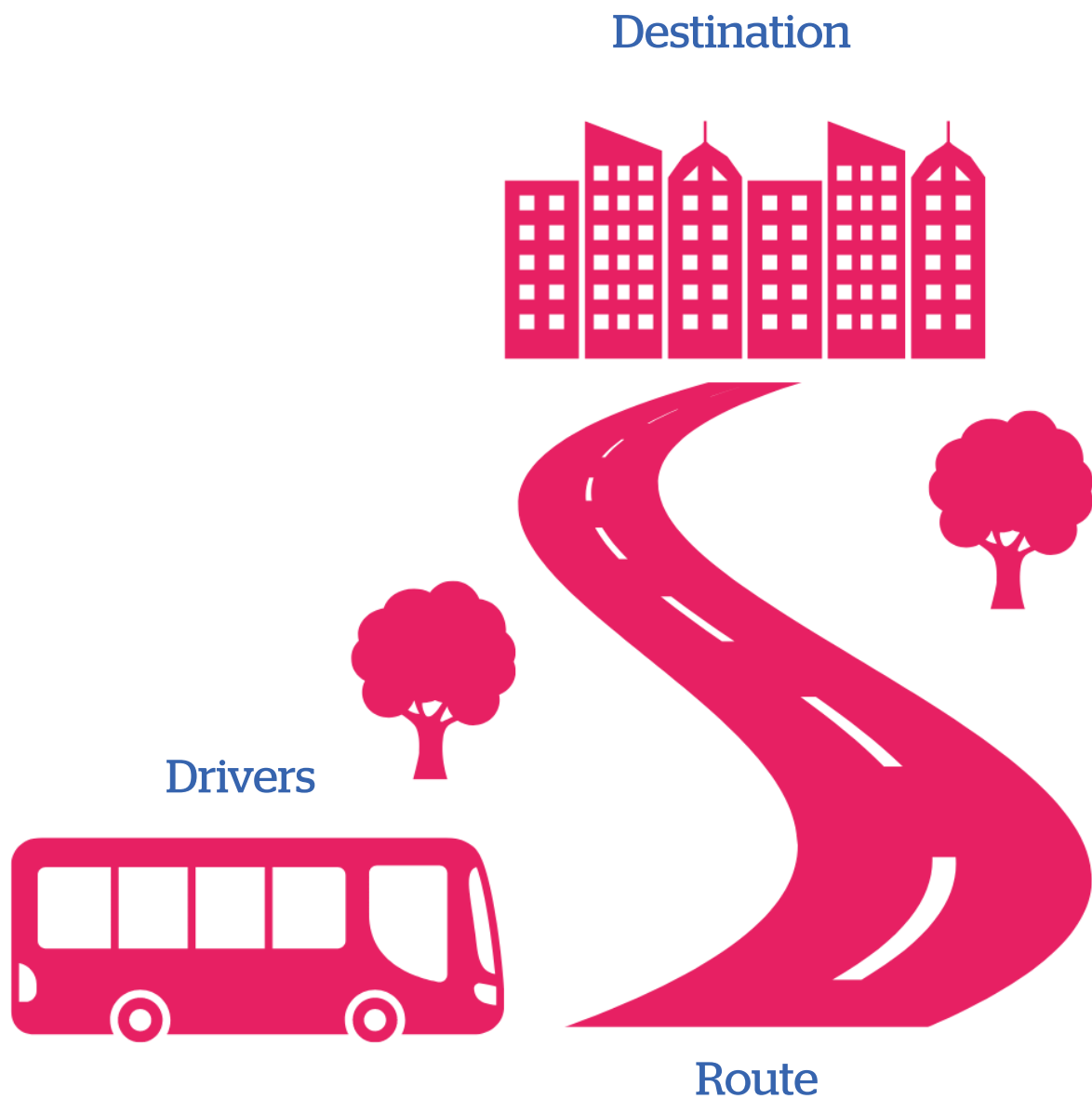
- 'Mapping for real' in districts to better understand what places are used by residents
- Influence system partners to rent space from key community locations, keeping wealth local and adding value to all services
- Change recruiting, commissioning, and contracts to include conditions related to this
- Embed in Senior Strategic plans for accountability and drive to deliver from the top down



2) Identify destinations where the *action* could be taken under each of our themes, which we could then join and support them to deliver it.

For each theme, we outlined a 'Destination' (governance space), 'Route' (ideas to put forward there), and 'Drivers' (who could help get there).

We did the same exercise for our Co-production approach so we could encourage other parts of the system to take up our *way* of doing things also.



## Stage 5: Achieving our ambitions – and sharing them



Welcoming points  
of contact

**Destination:** Oldham Cost of Living Working Group

**Route:** Cost of Living frontline staff training

As part of Oldham's response to the 2022/23 winter 'Cost of Living Crisis', training was devised by the Council's Organisational Development team on usage of a Money Advice Referral Tool. The plan was to offer this training to professionals and volunteers working on the frontline who might come into contact with people struggling in the months ahead.

The tool – developed as part of a project with Greater Manchester Poverty Action – is about getting the right *information* to people struggling with financial difficulties. It helps residents in the Borough access the financial support that they are entitled to, gives them confidence to navigate out of crisis, and helps create a 'no wrong front door' approach across the frontline.

Based on our discussions about Welcoming Points of Contact, the Commission identified this tool and training as a key part of what we wanted to encourage more of in Oldham. The missing element which had come through in our discussions was that people sharing the tool would need the right *empathy*. The more the training could help frontline workers understand what people are going through when they are in crisis, and how to adapt support to meet their needs, the more effective a point of contact they would be for anyone struggling with the cost of living.

To ensure that the people attending the training really understood why it mattered, our Grassroots Commissioners also committed to attending each session and contribute to discussions. That way, more people working closest with those experiencing hardship would be prompted to reflect themselves on what it is like to be in poverty and hear directly from people with lived experience.

Between October 2022 and March 2023, Commissioners supported 44 sessions in all 5 districts of Oldham. They contributed to the training of over 350 people delivering frontline support – deepening an understanding of welcoming points of contact and cultivating the skills involved in creating them.

The Cost of Living Group continued meeting over the course of the Winter, taking on board the learning from the suite of activities and approaches including the training. With the short-term crisis receding, but ongoing challenges no less significant, the Group will be evolving into a newly established 'Oldham Partnership Board'. This will continue encouraging more Welcoming Points of Contact across the borough.



Reducing stigma  
and raising hope

**Destination:** Oldham Poverty Action Network

**Route:** Cost of Living frontline staff training

The Oldham Poverty Action Network has taken up the mantle of the Commission. With a core of Grassroots Commissioners drawing on their experience of hardship to inform the direction, the Network has drawn in more partners from across the public and voluntary sector, and funding from the Local Motion group of national foundations.

The Network, facilitated by Action Together, has identified three 'Action Groups' to make progress on their shared areas of work:

- 1) Building out from the cost-of-living response
- 2) Hope and aspirations: creating routes out of poverty
- 3) Building a joined-up approach to poverty alleviation & prevention.

With a budget of £100,000 it is able to test out ideas, and proposals being put forward for longer term funding, one of the areas Task Group 2 is looking to achieve is a model of volunteering which will 'reclaim volunteering for people experiencing hardship'.

The aim is to recognise the ways people in poverty often already participate in their communities. To encourage these strengths as a route out of spiralling hardship while helping improve their own skills, health and wellbeing.

With a number of Commissioners attached, the Task Group is working on a volunteer model which enables someone to start their journey as a service user (e.g. of a food bank), to a volunteer helping provide support, to a leader supporting other volunteers in the same position, to using those skills in employment or whatever else they want to use their time and energy for.

The Task Group has identified these key things which would need to be implemented to achieve this:

- Capacity for organisations to host and develop volunteering opportunities
- Built in recognition and reward framework
- Links to employers including foundational economy and local public sector anchors, redesigning traditional recruitment processes, and work placements using an alternative skills model.
- Strengthen the connection between the Volunteer Centre brokerage and the DWP.
- Providing enterprise start up grants and / or connecting to existing business grants as part of the pathway.



**Destination:** Place Based Integration Task & Finish Group

**Route:** Planning for Real events

Places of belonging,  
knowledge and hope

Members of the Poverty Truth Commission have attended “Planning for Real” events in each of Oldham’s five districts, helping to identify key community assets as part of a mapping exercise to inform future decisions in relation to the place-based integration of services. The mapping not only included physical buildings and spaces, but the presence of existing public and voluntary services and community networks.

Discussions are ongoing about the nature of the services provided in district, informed by the mapping exercises the strategic re-modelling of services to support early intervention and prevention and for example, the creation of Warm Spaces in the borough as part of the Cost of Living Response.

It is intended that the district hubs are welcoming places where residents can get help, information and advice when they need it, make links to other services and access opportunities for learning and development.



**Destination:** Integrated Care Partnership Board

**Route:** Oldham Engagement Framework

Co-production

The Poverty Truth Commission was a blueprint for how high-spec co-production could happen in Oldham, but did not happen in isolation. It has contributed to an understanding across the borough of how “the council must reassess the way in which it delivers services moving away from the traditional paternalistic model of service delivery –*being done to* – to working with residents and partners as equals to understand the needs of the community and identify the most appropriate solutions.”

That statement was lifted from a report delivered to the Resident First Steering Group in October 2022, and later the Board of the new ‘Integrated Care Partnership’ overseeing NHS activities in Oldham. The report made recommendations to develop a system-wide Engagement Framework, committing resource, energy and strategic attention to how residents are involved in and inform all decisions in the borough which affect them.

Working with colleagues from Oldham Council, NHS and Voluntary Sector, the Commission approaches are being hardwired into this Framework. So far, a model has been developed for each level of ‘engagement’ which is needed to effectively achieve ‘nothing about us without us’ in Oldham, and what is needed to implement it. Including not just **how people share their views**, but **where they go** and **how the people who need to can hear them**, the ambition is a shared set of approaches which can drive up engagement with residents across the activities of Oldham Council, the NHS and the voluntary and community sector.

## How do you want to share your views?



## Testimony: Outcome for Individuals from the Poverty Truth Process

"Through Poverty Truth they've opened up doors for me. I feel very very settled now in my life. I've never felt this settled before. I've just made so many friends, the people feel like my family.

Since then I've come on leaps and bounds – my life has actually never been better. I'm now also a volunteer at OL1 Barker Street Community Centre. They're my family too. We've all made a commitment, to the people in the community but also to ourselves. It's about giving something back. You've been helped, I've been helped and it's just so nice to be in that position.

It was the best move ever that I made moving here. I just want to say thank you Oldham! I love you!"

Mandy Ugbomah  
Grassroots Commissioner



Some of the things our Grassroots Commissioners are doing now/ since



Speaking in Westminster at the All Party Parliamentary Group on Temporary Accommodation



Co-leading community support hubs and food pantries for people struggling with the cost of living



Piloting a Personal Improvement Programme based on lived experience of disadvantage



Sitting on the Greater Manchester board overseeing adult support and services



Organising community collections of items to send in response to floods in Pakistan



Travelling overseas to pick up an International Award for participation in public policy



Exhibiting at Oldham Business Expo



Volunteering with the Council Youth Service



Presented findings at GM Challenge Poverty Conference



Cooking meals for hundreds of people using ingredients from a community allotment

# Stage 6: Learning from our Commission

## What is next for the PTC?

Like a child nurtured through school and waved off at the train station when they leave home, the Poverty Truth Themes are now out there in the world. We raised them as a Commission, and we'll watch with pride as they make their way, but we're content for them to succeed or fail based on their own merit.

Each of the 'Destinations' identified continues to progress the ideas given into their care. Commissioners continue to get together via the Poverty Action Network, a vehicle which is able to grow the pool of people involved in this work. To sign up and participate in the Network, check out the upcoming dates on the Action Together website:

[www.actiontogether.org.uk/events](http://www.actiontogether.org.uk/events)

To understand more about the journeys of the Commissioners and how they relate to our themes, check out this video made with the support of local media company Kupod Productions: [www.actiontogether.org.uk/social-action-oldham](http://www.actiontogether.org.uk/social-action-oldham)



**Yaasmin**  
Points of Contact



**Simon**  
Stigma and Hope



**Mandy**  
Places of Belonging



**Lynda**  
Co-Production

Most importantly, what would some of our Commissioners say about their experience and the impact either personally, professionally, or because of their role?

Before...	But now..
I was an angry activist who was battling everyone, from the council to residents.	I've gone from 'Guy Fawkes' to 'Ghandi', understanding that there is no need to battle those that have the same goals.
I was confused, overwhelmed, wasn't sure of the outcome. Will we ever succeed, will we be heard or seen?	We are being heard. We have been acknowledged by different sectors. We have continued our journey.
I lacked confidence. I was isolated. I was lonely.	I am happy, excited, busy and involved.
I was full of anticipation, but frightened.	Happy and anticipating the continuation of our work.
It was good to be involved with the group.	I have been able to be more open with myself and have great open relationships with other members.
I had a voice but wasn't sure 'professionals' felt the same as I did or we could influence things for the better.	Can finally see things are beginning to change.

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# Oldham Poverty Action Network

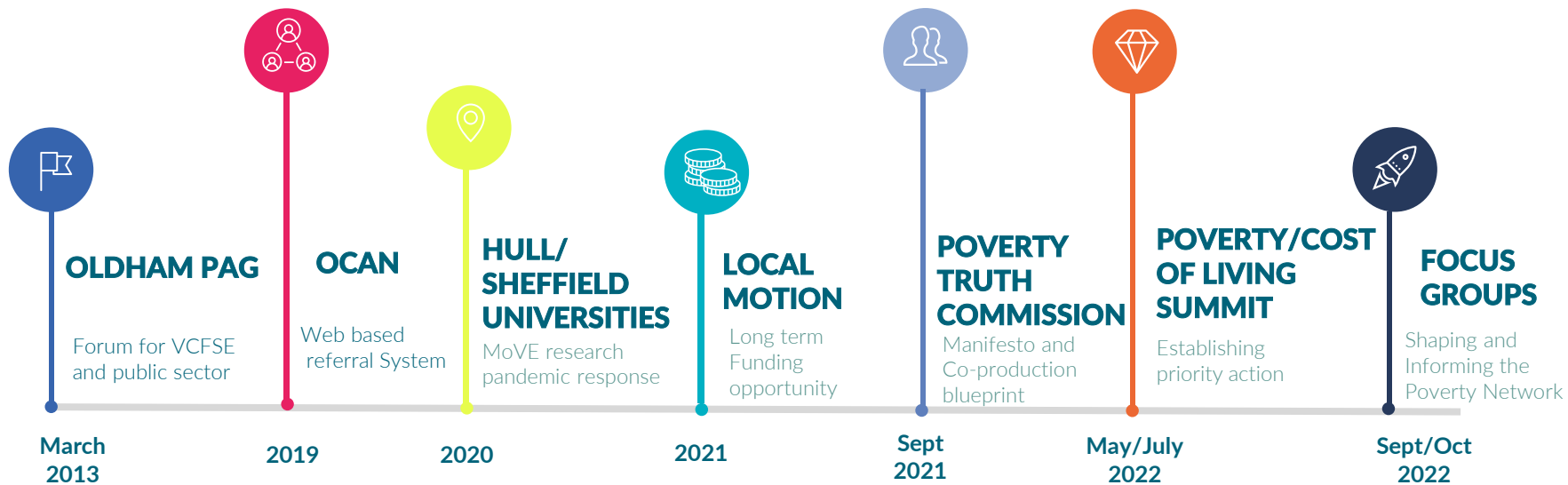
Laura Windsor-Welsh

Oldham Director - Action Together CIO



# OUR Journey: where we've been

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# Poverty Summit – July 22

Emerging priorities:

- Warm Spaces
- Person centred
- Lobbying
- Food access & provision
- Early Intervention and Prevention
- System change: creating a system that works for people and removing barriers
- Harnessing Lived Experience
- Hope and aspiration
- Wealth creation
- Training skills and opportunities
- Mental health
- Innovation
- Building out from covid response
- Action orientated

6 National Funders investing in 6 Places: Oldham, Lincoln, Camarthern, Middlesborough, Torbay and Enfield

For Communities, By Communities

Three Oldham priority themes: Strengthening community spirit, aligning efforts to tackle poverty, and creating good jobs and social enterprise.

8-year long term funding proposal

## Where we were....

**Poverty Truth Commission**  
(Manifesto and Co-pro blueprint)

**Oldham Community Advice  
Network** (referral tool)

**Thematic Networks** (Food  
Solutions; Rough Sleeping)

**MoVE** (evaluation  
and facilitation)

**Poverty/Cost of Living  
Summit** (network and  
partners)

**Oldham Poverty  
Action Network**



# Let's hear from our members with lived experience...

Page 52

The Oldham Poverty Truth Commission **brings together the experiences of people who have been in poverty alongside people who work in council and health services, businesses, and charities** to make deep changes to the causes of poverty in Oldham.



# Where we are now...



# Priority Task Groups

- 1. Building out from the cost-of-living response
- 2. Hope and Aspirations: Creating routes out of poverty
- 3. Building a joined-up approach to poverty alleviation & prevention.

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## Key Questions...

**What innovative approaches and models might we want to draw on?**

**What barriers might we jointly face?**

**How could we overcome these collectively?**



# Task Group 1 - Building out from the cost-of-living response

Co-designed Action focused on:

Page 55

1. Comms Campaigns that connect with people experiencing poverty and how they can get help and support
2. Oldham Community Advice Network – Digital Referral System, Connecting people seamlessly to the right support and advice

# Task Group 2 - Hope and Aspirations: Creating routes out of poverty

Co-designed Action focused on:

Page 56

Creating supported volunteering opportunities and developing the pathways into volunteering and employment.

1. Dedicated Volunteer Centre volunteering officer based with DWP Oldham Job Centre – working directly with people and their work coaches
2. Uplift Programme – Community organisations who can offer supported volunteering opportunities to people at the point of crisis.
3. Inclusive Recruitment Toolkit

# Task Group 3 - Building a joined-up approach to poverty alleviation & prevention

Co-designed Action focused on:

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## 1. Developing an Oldham Systems Conditions Forum

- Working together to create a space to explore and tackle system conditions that are preventing people moving out of poverty, with people with lived experience equitably involved alongside system partners.

## 2. Developing Community Leadership and Voice and Influence

- Developing community capacity and confidence to strengthen the community voice to influence system decision making.

# Systems Condition Forum

- Changing Futures – System Change Day May 23
  - System Conditions identified:
    1. Homelessness and housing
    2. Benefits sanctions
    3. Co-occurring conditions mental health and addiction
- Through the OPAN Task Group we have codesigned:
  - A framework for a system conditions forum
  - A statement of intent
- Jan 2024 Oldham Public Service Reform Board Members committed their organisations to working together using this approach



**“The way to get started  
is to quit talking and  
begin doing.”**

**Walt Disney**

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## **Report to Governance, Strategy & Resources Scrutiny Board**

### **Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31st December 2023**

**Portfolio Holder:** Councillor Abdul Jabbar, Lead Member for Finance & Corporate Resources

**Officer Contact:** Steve Hughes, Assistant Director Strategy & Performance

**Report collated by: Performance Improvement Team**  
[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

**Date: 21<sup>st</sup> March 2024**

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#### **Reason for decision**

Scrutiny of corporate performance aims to provide assurance that:

- our corporate priorities are aligned to the needs of our residents (resident focus)
- our services are good, or are on track to good
- any services that are not on track, or have identified risks, are being supported or challenged to rectify this
- any demand indicators or resource pressures are being noted and service provision is being re-assessed accordingly
- the organisation has robust performance management processes in place.

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## Summary

The purpose of this report is to provide an overview of corporate performance against agreed service business plan measures for the Q3 period.

The current reporting format has been developed as an interim solution, with a view to bringing more mature performance reporting online once the Business Insight, Performance and Strategy Programme (BIPS) Programme and Digital Services Foundation (DSF) Project have been completed.

## Recommendations

Scrutiny Board members are asked to:

- note the progress in implementing the business plan objectives
- celebrate areas of consistent good performance
- note the comments on progress
- consider areas for review (good or poor) that could produce learning for the organisation
- note the interconnection of these actions with ongoing activities in other portfolio and Scrutiny Board remits and key projects such as our [Cost of Living Response](#) and [Don't Trash Oldham](#).



## Corporate Performance Report 2023/24 Quarter Q3

### 1. Background

#### ***Business Planning***

1.1 The [Corporate Plan](#) 2022/27 was approved by Cabinet in September 2022; service and business plans are closely aligned to the priorities set out in this Plan.

1.2 Revised guidance for the development of service level business plans was issued for 2023/24 and it was agreed that plans should run from 1<sup>st</sup> April 2023 to 31<sup>st</sup> March 2027 in keeping with the timeframe of the Corporate Plan. A supplement to this guidance will be reissued to support the 2024/25 business plan cycle.

1.3 Service level business plans include a range of Key Performance Indicators (KPIs), both 'business as usual' and transformational, aimed at achieving the aspirations of the Corporate Plan and putting our residents first.

1.4 It is noted that business plans can be influenced by both internal and external factors, including increased demand, available resources, changes in legislation or policies, and so should be kept under review.

1.5 It is important that performance is viewed in the context of our borough; the published [district profiles](#) provide more detail on our borough and we will be providing an Oldham summary to sit alongside the CPR in due course.

1.6 The reporting format, initially presented at the 5th October 2023 meeting of the Scrutiny Board, has been developed as an interim solution, with a view to bringing more mature performance reporting online once the Business Insight, Performance and Strategy Programme (BIPS) Programme and Digital Services Foundation (DSF) Project have been fully completed.

1.7 The summary performance reports are presented in **five PowerPoints** for clarity and in keeping with previous comments relating to an over emphasis on data and a lack of nuanced insight and context. The format includes:

- summary for each service
- service successes
- key metrics
- areas for development
- Head of Service / Director's comments
- Portfolio holder comments (where applicable)
- glossary / list of acronyms and colour key.

1.8 This layout enables key data to be presented whilst also allowing space for discussion and context surrounding the quarter's performance. Each service has more opportunity to consider their performance holistically and take any necessary actions to improve or maintain performance levels.

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1.9 The Q3 Corporate Performance Report (CPR) has been prepared for the 21st of March 2024 meeting of the Governance, Strategy and Resources Scrutiny Board, however some parts of it may have also gone to the following meetings:

- Adults & Health Scrutiny Board on 07.03.2024
- Place, Economic Growth and Environment Scrutiny Board on 19.03.2024
- Children & Young People Scrutiny Board on 20.03.2024

### **Benchmarking**

1.10 In addition to in-house reporting, Scrutiny Boards may wish to consider reports from external sources. Where possible LG Inform Data and Oflog data has been used to provide benchmarking figures and services have been assisted to utilise these open data sets.

1.11 LG Inform provides a number of ready built reports that use published data; they provide useful trend or comparator information, for example:

- [Headline Report for Oldham Metropolitan Borough Council](#)
- [LG Inform Benchmarking Summary Report Q4 2022/23](#)

1.12 The Office for Local Government (Oflog) has launched a Local Authority Data Explorer with the primary purpose of '*providing a transparent and authoritative source of information about the performance of local government*'. The first set of metrics on the [Local Authority Data Explorer](#) covers four areas: Waste Management, Adult Social Care, Adult Skills and Finance.

1.13 Oflog are now in the process of agreeing a second set of metrics in relation to:

- Mayoral Combined Authorities (covering Business & Economic Growth, and Roads)
- Roads
- Business and Economic Growth
- Waste Management (fly-tipping)
- Corporate and Finance – includes complaints
- Planning.

### **Performance Reporting Development**

1.14 The Strategy & Performance Service are supporting services to review their Key Performance Indicators (KPIs). The aim is to ensure services have the right measures that demonstrate the right outcome or impact. We also need to ensure they correlate to Oflog measures and any other statutory returns to avoid unnecessary duplication. This work will also support the ongoing development of service business plans.

1.15 As part of the ongoing review, it has been determined that a standardised 'one size fits all' approach to performance monitoring is not feasible as the performance data that services produce differs. Some services produce data that is qualitative and readily benchmarked against milestones. However, for these to have the maximum relevance they need to be set in an appropriate timeframe – for example education services data needs to be reported termly as opposed to in financial year quarters (as previously).

Similarly, some strategic programmes, such as public health initiatives, will only show meaningful results over several years.

- Any variance in timeframe or other aspects of the KPI will be highlighted in reporting.

1.16 Many core services provide a supporting role to others, so performance within their functions cannot be measured quantitatively and success is identified by the performance of the services they support. Examples include Executive Support, Communications, Strategy & Performance, Transformation and Customer Digital Experience. These services have business plans outlining their overarching strategies but, their performance measures are milestone or project based. To avoid repetitive or inaccurate reporting for these services, performance reporting will only occur at the beginning and the close of the year when major milestones can be effectively and accurately reflected on.

Signed _____ Cabinet Member (specify whom)	Dated _____
Signed _____ Executive Director/Deputy Chief Executive	Dated _____

**Appendices:**

Summary performance reports:

1. Adults & Health
2. Children's social care
3. Economy & Environment
4. Education & Skills
5. Governance & Resources

# Report to Governance, Strategy and Resources Scrutiny Board

## Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31st December 2023

Page 56 of 68

**Portfolio Holder:** Councillor Abdul Jabbar, Cabinet Member for Finance  
& Corporate Resources

**Contact Officer:** Steve Hughes, Assistant Director of Strategy & Performance

**Report collated by:** Performance Improvement Team

[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

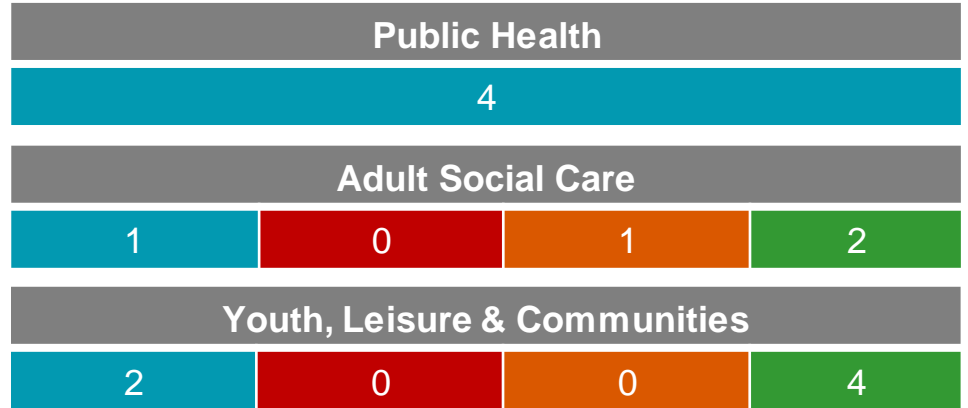
**Report date:** 21st March 2024

# Adults & Health

## Key Performance Indicators

<b>RED</b>	KPI's underperforming by more than 5%
<b>AMBER</b>	KPI's underperforming by less than 5%
<b>GREEN</b>	KPI's meeting or outperforming target
<b>TEAL</b>	No targets set

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# Public Health

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Barbara Brownridge

**Officer Contact:** Rebecca Fletcher, Director of Public Health

**Service Summary:**

Public Health are focused on helping people and communities in Oldham to improve their health and wellbeing, including the protection from threats to illness.

This service uses data and intelligence to meet statutory requirements, whilst championing the reduction of the health inequalities that we observe between Oldham and the England average; and within the borough between Oldham's most and least deprived wards.

# Public Health Key Metrics

Percentage achieving the expected standard for childhood immunisation

94%



Annual Data

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Number of delivered Health Checks

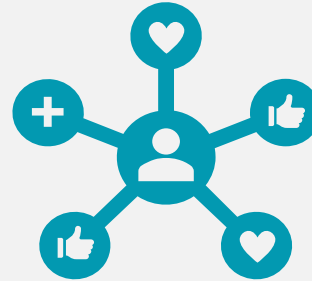
1580



Q2: 2138

Number of referrals to Social Prescribing

674



Q2: 808

Number visits to OCL Leisure Centres\*

429

(per 1000 population)



\*Figures from Dec

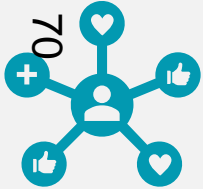
Q2: 483

# Public Health Successes



Percentage achieving the expected standard for childhood immunisation

We have been successful in making a business case to NHS GM to increase community engagement on MMR uptake, and to fund additional vaccination activity where it would make the most impact. A measles action plan has been developed.



Number of referrals made to Social Prescribing

The service now has a well-established presence in the ARCC which is improving the step-down and joint working with Adult Social Care and supporting the ARCC to manage demand into statutory services. Social Prescribing staff have taken part in the Resident Focus Ways of Working training.



Number of delivered Health Checks

We are monitoring the quality of completed Health Checks, and although the numbers this quarter are lower than in the previous quarter, the work on quality assurance is supporting us to drive up quality



# Public Health

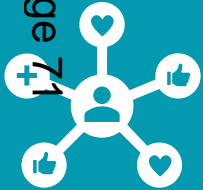
## Areas for Development



MMR Vaccination  
– Measles,  
Mumps and  
Rubella

The UK Health Security Agency has declared a national incident over a surge in measles cases across the country. For population 'herd' immunity it is important that 95% of people are fully vaccinated with 2 doses of MMR. Data is showing that 81.4% of children in Oldham are fully vaccinated by the age of 5. Given the national concern with identified cases of Measles, Oldham has established a multi stakeholder action plan alongside securing NHS England funding to drive up vaccination rates in our under vaccinated population.

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Number of  
referrals made  
to Social  
Prescribing

This is down on previous quarters, although referrals for the year likely to exceed 2022/23. There has also been slightly reduced capacity in the service due to vacancies and sickness. The contract for the service will be extended to 31st October 2024 which will enable service delivery to continue.



Number of  
delivered  
Health  
Checks

Oldham Council commissions GP practices to deliver NHS Health Checks to eligible patients aged 40-74. Although the data shows uptake has been reasonable in Q3, the standard of delivery and number of quality markers achieved, including onward referral, has been below the standards that we would expect. Plans are in place to drive improvements and ensure that the HC's are meaningful and impactful for residents.

# Public Health

## Comments

### Q2: Rebecca Fletcher (Director of Public Health)

The service is broadly tracking against expected outcomes and is comparable to Q1 in most domains. There are some excellent successes, notably the grant award for swimming pool utilities. Where there is identified reduced attainment, it is as a result of workforce challenges across multiple providers or other external pressures. Public Health continue to work with provider services to mitigate against any performance challenges.

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### Q3: Rebecca Fletcher (Director of Public Health)

The work to improve MMR coverage has been a priority over the past quarter and will continue to be so due to the issues with outbreaks in other parts of England. The MMR action plan and multiagency approach is focusing on community involvement drawing on lessons learned from COVID. We have seen increases in our contraceptive provision in primary care which is encouraging but there is still a lot of work to be done.

Signed Off: 02/02/24

# Public Health

## Portfolio Holder Comments

**Q2: Councillor Barbara Brownridge**

It is a cause for concern that many of the services that are delivering real progress in public health are under threat from budget pressures in both the council and the NHS.

**Q3: Councillor Barbara Brownridge**

Signed Off:           DD/MM/YY

# Adult Social Care

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Barbara Brownridge

**Officer Contact:** Jayne Ratcliffe, Director of ASC

**Page**  
**74**  
**Service Summary:**

Adult Social Care in Oldham – "Supporting you to be independent, healthy, safe and well".  
Adult Social Care, working with the rest of the Council, the voluntary sector, local communities and NHS partners will encourage and enable you, your family and community to stay healthy, safe and well. The aim is to enable Oldham residents to live as independently as possible. Where residents need support, we will help to identify the best solutions. If people need help but are not able to arrange their own care, the support we identify with residents will help you to live the best life they can, with the help they have around them.

# Adults Social Care

## Key Metrics

% of older people still at home 91 days after discharge from hospital into reablement/rehabilitation services (effectiveness of the service)

Page 75

93.8%



Target = 89%

Q2 = 87.7%

% of concluded section 42 enquiries with risk identified where risk reduced is the outcome

62.2%



No target set

Q2 = 67%

% of community-based providers rated as 'good' or 'outstanding'

85.3%



Target = 90%

Q2 = 85.3%

% of completed annual (planned) reviews

86.6%



Target = 65%

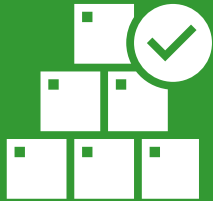
Q2 = 85.2%

# Adults Social Care Successes

Page 76



Hospital Discharges and hospital avoidance in Oldham is sustaining people in the community very well. The Hospital Discharge team leads across Greater Manchester as an exemplar of best practice. The challenge the service faces is responding to much more acuity in Health & Social Care in the community, meaning people need more intensive support for longer times. The Discharge Integration Frontrunner project is continuing with the test of change to explore how we can prevent adults with dementia being admitted into hospital.



There has been a lot of work undertaken with a project team commissioned by REED to undertake statutory reviews and other areas of high demand/priority work. We have seen great progress in the team supporting adult social care to manage competing priorities. The service will finish at the end of March 2024.

# Adults Social Care

## Areas for Development

Page 77



Adult Strategic Safeguarding are working closely with Business Strategy to ensure work is completed so we can capture risk outcome of Section 42 enquiries. This work will be overseen by the Oldham Safeguarding Adults Board.



The Commissioning and Market Management service continues to work alongside providers supporting them to provide good quality services for Oldham residents. Whilst we cannot control when the CQC inspect our local providers we continue to monitor and support them to sustain improvements.

# Adults Social Care

## Comments

### Q2: Jayne Ratcliffe (Director of ASC)

The service is working in accordance with a clear reform and transformation programme to ensure a good standard of service is provided to Oldham residents. The service has launched a new operating model, vision and will be imminently launching a new strategy. The focus for Adult Social Care is service improvement, it is expected there will be an increase in all aspects of performance measures.

Page 78

### Q3: Jayne Ratcliffe (Director of ASC)

The service continues to work in accordance with its statutory duties under the Care Act, to meet the assessed needs of Oldham residents. There remains significant work to continue to embed new ways of working, to manage demand and ensure staff are working to a strength-based approach. However, there are currently workforce challenges, which is having an impact on capacity and demand.

Signed Off: 02/02/2024



# Adults Social Care

## Portfolio Holder Comments

### Q2: Cllr Barbara Brownridge

Thanks to the great efforts of the staff involved the service is making good progress towards meeting its targets but continuing workforce shortages and increased demand especially from complex needs together with continuing budget pressures will make continuing progress more difficult to achieve.

### Q3: Cllr Barbara Brownridge

Signed Off:           DD/MM/YY

# Youth, Leisure and Communities

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Peter Dean (Communities, Libraries, Heritage and Arts)  
Cllr Chris Goodwin (Neighbourhoods, Community Safety, Stronger Communities),  
Cllr Shaid Mushtaq (Youth)

Page 80

**Officer Contact:** Neil Consterdine, Assistant Director Youth, Heritage, Libraries, Arts and Communities

### Service Summary:

Delivery of a range of community services and provision including – Youth Work, Heritage, Libraries and Arts, Community Development, Placed based and District Working, Community Safety and Stronger Communities. Resident focussed services closer to where people live.

# Youth, Leisure & Communities

## Key Metrics

Page 81

Number of children & young people engaged with the integrated youth service



880

(50.3% increase)

Q2 = 504

Target = 500 (per quarter)

Number of individual attendees at 'Hate and How to Effectively Challenge' sessions



128

Q2 = 95

No Target Set

Number of individual young people visiting the outdoor education service (cumulative)



4406

(925 = 26.6% increase)

No Target Set

Number of Youth work sessions delivered



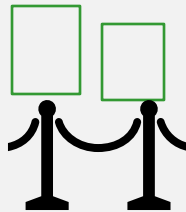
447

(49.9% increase)

Q2 = 504

Target = 300 (per quarter)

Number of visitors to Gallery Oldham



12,832

Q2 = 10,758

Target = 9470

Total number of loans per quarter (physical and digital, books, magazines, and newspapers)




95,452

Q2 = 108,082

Target = 80,000

# Youth, Leisure & Communities Successes

Page 82



Number of Youth work sessions delivered (Cumulative)

Establishment of District based youth work team is in place and the number of sessions being delivered is now exceeding expected levels.



Number of children & young people engaged with the integrated youth service

Engagement levels are increasing with new youth work developments such as the schools-based work and district sessions.

# Youth, Leisure & Communities

## Areas for Development

Page 83



Number of individual young people visiting the outdoor education service

The lack of the climbing tower impacts delivery by limiting the number of sessions we can deliver on site and therefore the number of young people accessing the service. We are currently exploring options around how the tower can be replaced.



Total number of loans per quarter (physical and digital, books, magazines, and newspapers)

Slight dip in figures is due to the change of e-magazine supplier (from Libby to Borrowbox) and the way in which they record issues and views.

# Youth, Leisure & Communities

## Comments

### Q2: Neil Consterdine (Assistant Director)

Demand across all is currently really high. Specifically, this is currently an issue in Community Safety and the Youth Service with high demand in specific areas. All services have seen an increase from residents attending facilities, sessions or activity which is a real positive.

Page 84

### Q3: Neil Consterdine (Assistant Director)

Demand for all community services remains high. Youth work sessions in the Districts are having a positive impact on young people with a growing number in attendance. The rollout of place-based working continues to be positive with the customer offer launch planned for February. The lack of a climbing tower at Castleshaw is impacting on business along with recruitment in some areas.

Signed Off: 30/01/24

# Youth, Leisure & Communities

## Portfolio Holder Comments

**Cllr Shaid Mushtaq (Youth)**

**Cllr Peter Dean (Communities, Libraries, Heritage and Arts)**

**Cllr Chris Goodwin (Neighbourhoods, Community Safety, Stronger Communities)**

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Signed Off:           DD/MM/YY

# Report to Governance, Strategy and Resources Scrutiny Board

## Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31st December 2023

Page 86

**Portfolio Holder:** Councillor Abdul Jabbar, Cabinet Member for Finance  
& Corporate Resources

**Officer Contact:** Steve Hughes, Assistant Director of Strategy & Performance

**Report collated by:** Performance Improvement Team

[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

**Report date:** 21st March 2024



# Children's Social Care & Early Help

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Shaid Mushtaq Cabinet Member for Children & Young People

**Officer Contact:** Julie Daniels, Director Children's Social Care and Early Help

### Service Summary:

Page 87  
In Oldham we want all children and young people to have a safe, happy, and healthy life and access to a great education giving them the best possible start in life. As a service we commit to:

- Putting children and young people first
- Helping families and supporting vulnerable children and young people
- Working as one team close to our community
- Providing great public value and confidence

Our ambition is not just to be the best borough for children and young people but to be the best borough the staff and services that work with them.

# Children's Social Care & Early Help

## Key Metrics



Target  
10%

Percentage of Children Looked After with three or more placement moves in the last 12 months

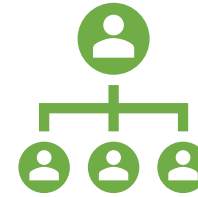
Q3 7.4%



Target  
21%

Percentage of child protection plans which were a second or subsequent plan in the past two years

Q3 3.4%



Target  
20%

Percentage of Agency Social Workers in Children's Social Care

Q3 38.9%



Target  
75%

Early Help - Percentage of children in families closed with all issues addressed (excludes worklessness)

Q3 89.4%



Target  
85%

Percentage of Children Looked After that have a permanence plan within four months of becoming looked after

Q3 93.2%



Target  
60%

Percentage of Care Leavers aged 19+ in Education, Employment or Training

Q3 46.2%



Target  
70%

Percentage CLA in long term stable placements

Q3 52.6%



Target  
90%

Percentage of Children Looked After with an up-to-date annual health assessment

Q3 81.5%

# Children’s Social Care & Early Help

## Further Successes

Performance Measure	Target	June	Sept	Dec	Polarity	Q2 to Q3 Difference	Trend
Percentage of Care Leavers aged 16-18 (post year 11) in Education, Employment or Training	70%	49.30%	55.1%	60.2%	High is good	5.10%	Increase
Percentage of Care leavers in unsuitable accommodation aged 19-24	5%		3.2%	2.5%	Low is good	-0.70%	Decrease
Percentage of Care leavers in unsuitable accommodation aged 17-18	5%		3.8%	3.3%	Low is good	-0.50%	Decrease
Rate of registered social worker turnover		23.30%	19.1%	10.9%	Low is good	-8.20%	Decrease
Percentage of Children Looked After placed within In-house Provision	60.0%	53.7%	54.5%	55.0%	High is good	0.50%	Increase

# Children’s Social Care & Early Help Successes

Page 90

KPIs	Comments
Percentage of Children Looked After with three or more placement moves in the last 12 months	Despite long-term placement stability being impacted recently, the service has worked well to ensure children don’t experience subsequent moves. There has been practice improvement on matching, placement identification, placement utilisation and improving transitions for children.
Percentage of child protection plans which were a second or subsequent plan in the past two years	There has been further improvement in the performance data relating to second or subsequent child protection plans in a 2-year period. The Safeguarding and Independent Review unit undertake oversight of all requests for CP conference to ensure that planning is reflective of the level of need and appropriate actions to safeguard are in place, particularly where children are made subject to child protection planning for a second or subsequent time.
Percentage of Agency Social Workers in Children's Social Care	We have seen a further reduction in the use of agency social workers to below 40%. We have recently reviewed our job adverts and strengthened recruitment processes to ensure we are competitive as an employer of choice for social work.
Early Help - Percentage of children in families closed with all issues addressed (excludes worklessness)	As part of the work on Supporting Families (SF), there is a strong focus on achieving good outcomes on different dimensions of need and we are achieving positive results in relation to most families (almost 90%) having all issues addressed by the time of case closure. We will be having a particular focus during the next year in improving outcomes around school attendance.
Percentage of Children Looked After that have a permanence plan within four months of becoming looked after	There has been a slight decrease of 3% in relation to children having a permanence plan within four months of becoming looked after. Overall performance for Q3 is 93% which remains above our 85% target.

# Children’s Social Care & Early Help

## Areas for Development

KPIs	Comments
Percentage of Children Looked After in long term stable placements	There has been an increase in the number of children looked after who have moved placement having been in the previous placement over two years. The decline is an indication of the pressures within the services to children looked after currently. Stability of placements is a key priority with a variety of support options available to carers and staff.
Percentage of Care Leavers aged 19+ in Education, Employment or Training (EET)	<p>Breaking this down, we have seen an improvement in young people aged 19 in EET. For this age group it is currently 52%. However, the age cohort of 20-year-olds who have been more affected by the legacy impact of the pandemic is challenging which impacts the overall number. Not all young people aged over 21 years remain active with the service, and those that do have specific needs to be resolved prior to stepping down intervention.</p> <p>The service along with key partners are delivering a bespoke action plan to enhance the opportunities available for care leavers.</p>
Percentage of Children Looked After with an up-to-date annual health assessment	Upon interrogation of the performance data in this area, all assessments have now been recorded on children’s files. We have been made aware of staffing challenges with Health partners completing assessments. We are working in partnership to improve the timeliness of completing assessments and ensuring the systems are in place to have these available on children’s records.

# Children's Social Care & Early Help Comments

## **Julie Daniels (Director Children's Social Care and Early Help)**

A positive return on performance this quarter. The three areas for development predominantly relate to placement sufficiency for children and young people which is a thread through the children's transformation programme. There has been a continuous downward trend in the number of agency social workers in the workforce which has improved further in this quarter.

## **Cllr Shaid Mushtaq (Portfolio Holder)**

I am pleased to observe the progress in a significant number of this quarter's performance indicators. I am assured through my regular briefings and portfolio updates on the targeted work in relation to placement sufficiency and workforce.

# Report to Governance, Strategy and Resources Scrutiny Board

## Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31st December 2023

Page 93

**Portfolio Holder:** Councillor Abdul Jabbar, Cabinet Member for Finance  
& Corporate Resources

**Officer Contact:** Steve Hughes, Assistant Director of Strategy & Performance

**Report collated by:** Performance Improvement Team

[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

**Report date:** 21st March 2024

# Economy

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Elaine Taylor, Portfolio Holder Housing & Licensing

**Officer Contact:** Paul Clifford, Director of Economy

Page 94

**Service Summary:** Economy consists of five functions: Economic Growth, Housing, Planning, Property & Projects and Creating A Better Place; each area has their own vision and 2023/27 Business Plan.



# Economy Successes

Page 95

KPIs	Comments
<p>Percentage of Appeals for major planning applications allowed</p>	<p>Target &lt;10% 0 appeal decisions on major developments has been achieved</p> <p><i>Description: Appeals for major planning applications allowed by Inspector (i.e. Council's planning decision overturned) as a percentage of major applications decided during the period</i></p>
<p>Number of new affordable homes that have been completed in Oldham</p>	<p>Annual Target: 101 . Overall total for Q3 is 43 homes 61.42% The sector is making significant progress in expanding affordable housing options, ensuring that more residents can find comfortable and cost-effective homes within their community, indicating a strong commitment towards meeting the housing target.</p>

# Economy Key Metrics

Page 96



Target  
25%

Percentage of completed homes that are affordable

61% for Q2 - proportioned over months as individual months not known



Number of known rough sleepers

Intelligence based estimate informed by spotlight count. Q3: 1



Target  
>60%

Percentage of major applications completed within 13 or 16 weeks or with an agreed Extension of Time

Q3 100%



Annual  
404

Total new homes competed

Q3: 70 Overall Total: 186



Q2  
470

Number of households in temporary accommodation

Q3 533



Target  
<10%

Percentage of Appeals for non-major planning applications allowed

Q3: 0%

# Economy

## Areas for Development

Page 97

KPIs	Comments
Total new homes completed	<p>A more accurate picture on new housing completions is reflected on over a full year, as many completions throughout the year are not formally registered or picked up until March. However, based on current predictions, it is unlikely that Oldham will achieve the 404 annual completions targeted this year.</p> <p>This is due to a slowdown in the housing market as a result of challenges in the economy and a lack of larger housing sites under construction at the moment. It would be expected that this will pick-up over the next few years as developments such as Muse’s proposals in the Town Centre and the various strategic planning allocations come forward for development.</p>
Number of households in temporary accommodation	<p>There has been an increase in households entering temporary accommodation from a final figure of Q2: 470 being increased to Q3 533. Further investment in the sector is being completed.</p>

# Economy Comments

## Emma Barton, Deputy Chief Executive

The number of households within Temporary Accommodation is at an all-time high. This is as a result of the increased number of households who find themselves homeless coupled with the lack of supply of suitable affordable accommodation. There has been corporate acknowledgement that the Housing Service is in crisis and as such a Housing Recovery Board (HRB) has been instigated. The HRB brings together the senior leadership team from across the Council to oversee a number of different workstreams which aim to tackle the issues faced. The key workstreams are resident access, housing needs / placements, housing supply, enforcement and standards. The workstreams will identify any gaps in service and resource plan will be created for consideration.

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Signed Off: \_\_\_\_\_

# KPI Summary

red	2
amber	0
green	8

# Environment

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Chris Goodwin, Neighbourhoods, Community Safety, Stronger Communities

**Officer Contact:** Nasir Dad, Director of Environment

### Service Summary:

Environment Directorate consists of five Service areas: Environmental Services, Public Protection, Highways & Engineering, Waste and Fleet and Street Lighting; each area has their own vision and 2023/27 Business Plan.

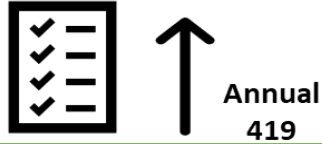
# Environment Successes

KPIs	Comments
Number of food hygiene inspections and revisits carried out	In Q3, the team successfully surpassed their annual target by conducting a cumulative total of 427 inspections and revisits, exceeding the set goal of 419. This achievement reflects the team's efficiency and commitment to ensuring food safety standards within the community.
Streets and ground inspections completed	The team have, for the first time this financial year, exceeded the inspection target of 15% (16% achieved) This achievement marks a notable success for the team, reflecting their dedication and hard work in maintaining the community's standards. Their efforts ensure that public spaces remain safe and well-maintained, directly contributing to the quality of life in Oldham.

# Environment

## Key Metrics

Page 102



**Number of food hygiene inspections and revisits**

Q3 427



**Environmental cleanliness indicator**

Q3 Average 16%



**Number of applications received for selective licensing**

Monitoring of number of applications received for selective licensing: Q3: 39



**Percentage of household waste which is sent for reuse, recycling, or composting**

Q3 44.12%



**Number of New Taxi Driver Applications made to the Council**

Q3: 890 This increase in new driver applications is in response to the new policy changes. Further changes to the vehicle age may impact positively to ensure a more comprehensive local licence control of the Taxi fleet



**Number of private landlord licenses granted**

Q2: 66 private landlord licenses granted



# Environment

## Areas for Development

KPIs	Comments
KPI review	Historical and statutory KPIs have been used to report on performance, there is area for improvement in the breadth of the KPIs to be more representative of the service.

# Environment

## Comments

### **Nasir Dad, Director of Environment**

The Directorate continues to face significant demand for service across all respective areas. Demand has continued to increase and especially in areas of waste/fly tipping, pest control (since the service became free) and housing related complaints are also increasing due to the change in weather conditions and are expected to continue to increase over winter months. To deal with the demand, the housing standards team has been fully staffed after a successful recruitment exercise. The pest control team has successfully addressed the backlog and typical response times to complaints are now 1 week. Winter maintenance has been in operation for two prolonged storms, and two significant periods of snow and ice. This has been supported by environmental services in dealing with fallen trees and other cleansing challenges.

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Signed Off: \_\_\_\_\_

# KPI summary

red	0
amber	1
green	5

# Report to Governance, Strategy and Resources Scrutiny Board

## Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31st December 2023

Page 106

**Portfolio Holder:** Councillor Abdul Jabbar, Cabinet Member for Finance  
& Corporate Resources

**Officer Contact:** Steve Hughes, Assistant Director of Strategy & Performance

**Report collated by:** Performance Improvement Team

[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

**Report date:** 21st March 2024

# Education & Early Years

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Mohon Ali, Cabinet Member for Education & Skills

**Officer Contact:** Matt Bulmer (Director of Education, Early Years and Skills)

### Service Summary:

In Oldham we want all children and young people to have a safe, happy, and healthy life and access to a great education giving them the best possible start in life. As a service we commit to:

- putting children and young people first
- helping families and supporting vulnerable children and young people
- working as one team close to our community
- providing great public value and confidence

Our ambition is not just to be the best borough for children and young people but to be the best borough for the staff and services that work with them.



# Education & Early Years

## Key Metrics



Target  
85%

Timeliness of quality EHC plans: percentage completed within 20 weeks over 12 months

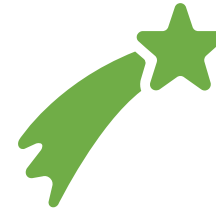
Q3: 83% A 4.9% Increase from the previous term



Previous  
Term: 90.9%

Attendance rates in Oldham secondary schools

Autumn Term: 91.7%



Previous  
Term: 89%

Percentage of Oldham primary schools that are judged as good or outstanding by OFSTED

Autumn Term: 93%



Previous  
Term: 0.6%

Percentage of fixed term suspensions in primary schools

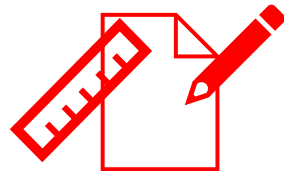
Autumn Term: 0.2%



Previous Term:  
14.04%

Percentage of fixed term suspensions in secondary schools

Autumn Term: 7.17%



Target  
3.5%

Percent of 16- to 17-year-olds who are not in education, employment or training (NEET)

Autumn Term: 4.67%



National  
Average: %

Attendance rates in Oldham primary schools

Autumn Term: 94.3 Attendance increased 1% compared to the previous term but still below national average



Previous  
Term: 46%

Percentage of Oldham secondary schools that are judged as good or outstanding by OFSTED

Autumn Term: 46%

# Education & Early Years Successes

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KPIs	Comments
Timeliness of quality EHC plans: percentage completed within 20 weeks over 12 months	Timeliness has increased throughout 2023/24 but is still lower than in previous years (due to demand). The IDOX case management system has improved timeliness, as has additional capacity in the SEND team. Late Autumn Term is usually a time of less demand in terms of EHC needs assessments. We still track above national which is 50%.
Attendance rates in Oldham secondary schools	Unvalidated data shows Oldham secondary attendance is above national. Key pupil groups including children on Free School Meals (FSM) and those with an Education, Health Care Plan (EHCP) are significantly above national. Boy's attendance is higher than girls.
Percentage of Oldham primary schools that are judged as good or outstanding by Ofsted	A positive trajectory over four years has seen the proportion of schools rise to the highest figure yet, with schools previously judged Requires Improvement moving to Good and new academies judged Good.
Percentage of fixed term suspensions in primary schools	Increased partnership support including non-traded Educational Psychologists (EP) and Quality and Effectiveness Support (QEST) services, weekly multi agency drop ins to support schools, Pupil at Risk of Exclusion (PARE) responses/interventions and the primary outreach service intervention
Percentage of fixed term suspensions in secondary schools	Increased partnership support including non-traded Educational Psychologists (EP) and Quality and Effectiveness Support (QEST) services, weekly multi agency drop ins to support schools, Pupil at Risk of Exclusion (PARE) responses and drop ins in person with SEND and Inclusion at some secondary schools, lots of partnership support and engagement regarding SEND and Inclusion in secondary schools

# Education & Early Years

## Areas for Development

KPIs	Comments
Percent of 16- to 17-year-olds who are not in education, employment or training (NEET)	Rates have not increased since last year's rates, this is despite targeted work on the unknown cohort which has reduced significantly which is positive. Work continues supporting this cohort, and our new "Empower Oldham" Project will provide further enhanced support to these young people. Unfortunately, we have recently lost some crucial education provision in the local area which means our offer to NEET young people is temporarily reduced whilst we find a solution. We will be reviewing our targets as the national picture for NEET's has moved significantly.
Attendance rates in Oldham primary schools	<p>Unvalidated data shows Oldham primary attendance below national. The attendance of children on Free School Meals (FSM) and those with an Education, Health Care Plan (EHCP) is above national. The attendance of boys is below that of girls.</p> <p>An attendance campaign is to be launched in February. Targeted attendance meetings are held with schools below 90%. Fines will increase to more than once per year.</p>
Percentage of Oldham secondary schools that are judged as good or outstanding by OFSTED	<p>A negative trajectory over time has seen the proportion of schools fall to below 50%, with schools previously judged Good moving to Requires Improvement and new academies being judged Requires Improvement.</p> <p>Ofsted judgements occur on a 4-year cycle, so change in the indicator takes time and can lag behind school performance data. 11 of 13 schools had improved outcomes in 2023. DfE have targeted £0.9M into further KS4 improvements. This will positively change the indicator over the next 4 years.</p>

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# Education & Early Years

## Comments

### **Matt Bulmer (Director of Education)**

We are developing an employment and skills strategy for the borough. A key part of this strategy will be focussed work to reduce the NEET rate. The strategy will be launched shortly. School attendance continues to be a key focus with a range of targeted work with schools which has improved our position significantly from last year. It will take some time for our improved key stage results to translate into improved Ofsted outcomes in the secondary sector.

### **Cllr Mohon Ali (Portfolio Holder)**

My employment and skills partnership board has focussed much of its work on providing effective transitions for young people into the world of employment. This is a true partnership effort across Oldham, and I am grateful to all those partners for the effort and enthusiasm that they have brought to that work. I am confident that, together, we can work to make significant improvements. Again, our work with our schools has significantly improved our attendance position from the previous year, and I thank our schools for their efforts. We continue to see strong Ofsted outcomes in our primary sector. Whilst the position in the secondary sector will be less positive in the short term, in the medium term I expect to see our improved key stage results translate into improved inspection outcomes.

Signed Off: 7/2/24

# Report to Governance, Strategy and Resources Scrutiny Board

## Corporate Performance Report 2023/24 for Quarter 3: 1st October to 31<sup>st</sup> December 2023

Page  
12

**Portfolio Holders:** Council Arooj Shah (Cabinet Member for Reform & Regeneration) & Councillor Abdul Jabbar (Cabinet Member for Finance & Corporate Resources)

**Officer Contact:** Steve Hughes, Assistant Director of Strategy & Performance

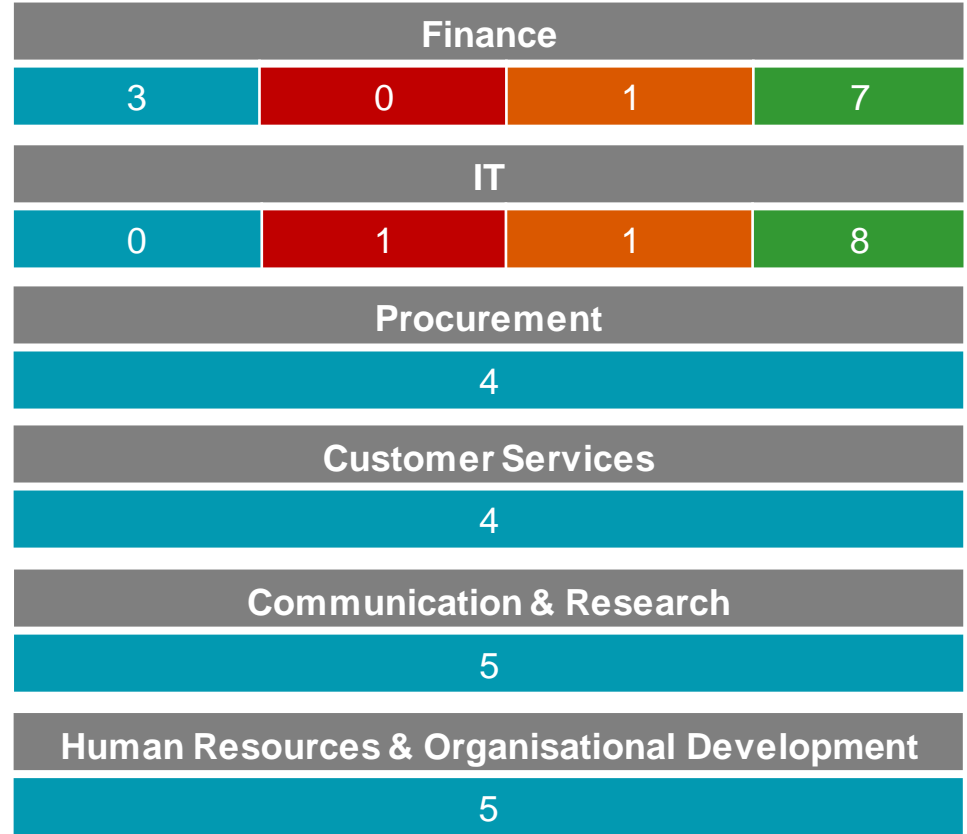
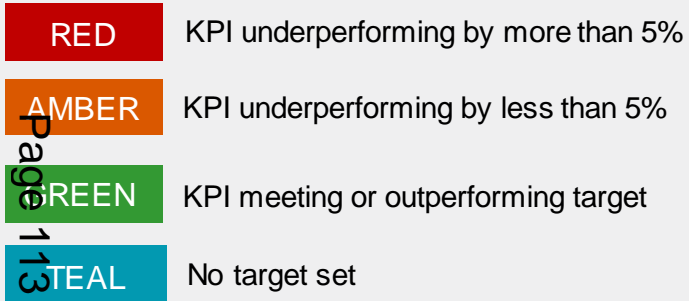
**Report collated by:** Performance Improvement Team

[StrategyandPerformance@oldham.gov.uk](mailto:StrategyandPerformance@oldham.gov.uk)

**Report date:** 21st March 2024

# Governance & Resources

## Key Performance Indicators



# Finance

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Abdul Jabbar

**Officer Contact:** Julie Smethurst (*Assistant Director Revenues & Benefits*)

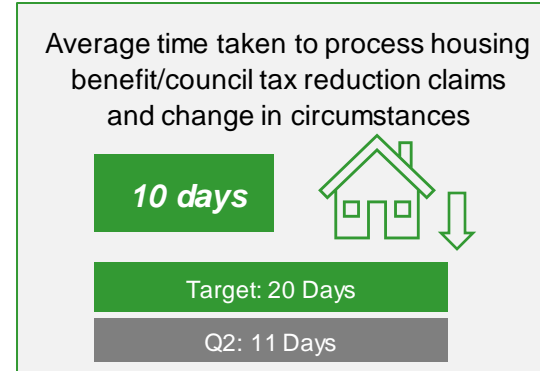
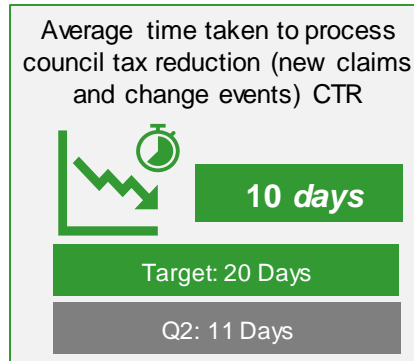
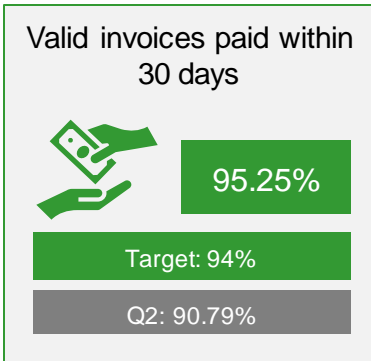
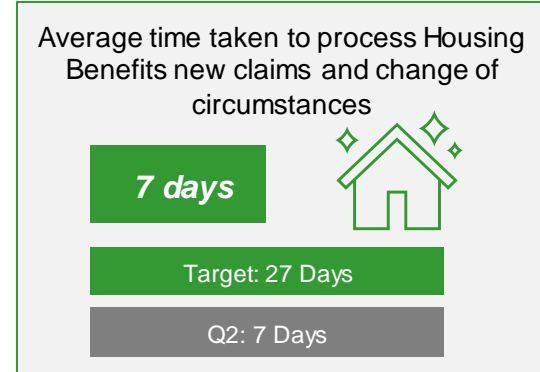
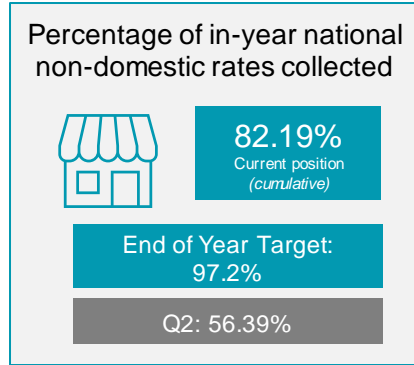
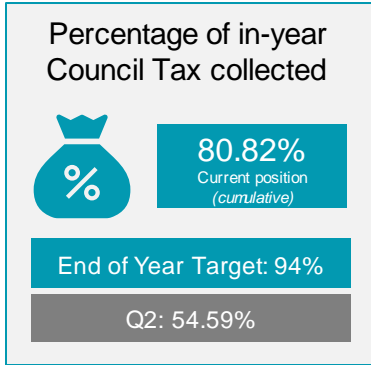
### Service Summary:

The Finance Service provides a wide range of functions primarily focussed on the delivery of financial management information, advice and support to Council officers and Members, but also members of the public, Central Government and other partner organisations.

# Finance

## Key Metrics

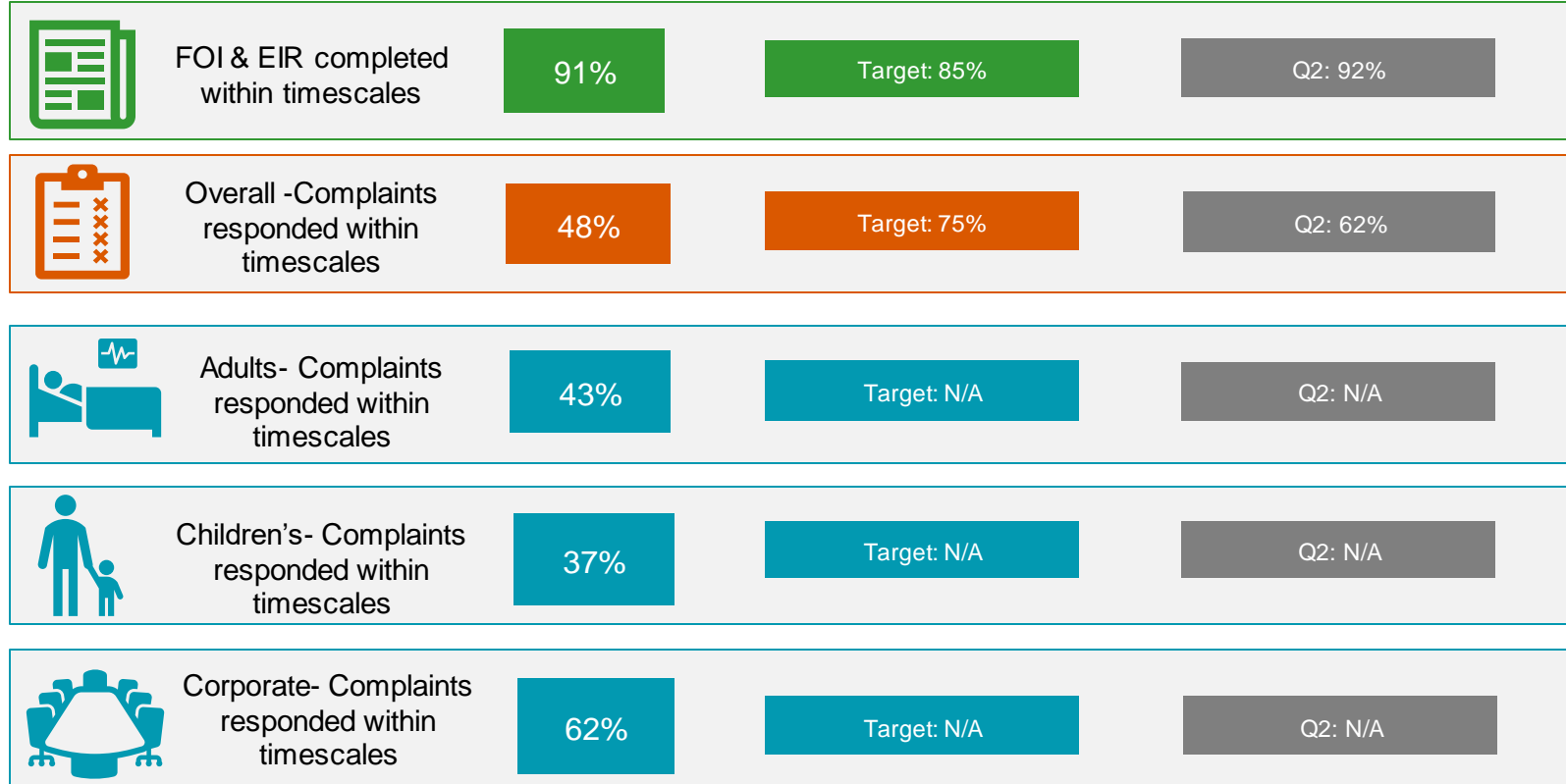
Page 115



# Finance

## Key Metrics

Page 116



# Finance

## Successes



Valid invoices paid  
within 30 days

The accounts payable team have done well to improve on the previous quarter's performance.



Average time taken to  
process Housing  
Benefits new claims and  
change of circumstances

The processing times are improving as a result of ongoing automation.



Adults' Complaints  
responded within  
timescales

A new complaints process has now been agreed with Adult Social Care. It is hoped that this process will streamline the allocation process and improve the quality of draft responses, in turn resulting in faster turnaround times.



Childrens' Complaints  
responded within  
timescales

A further training session regarding investigating and responding to complaints is in the process of being arranged for Children's Social Care staff. It is hoped that this will result in faster turnaround times and better-quality responses.



Corporate Complaints  
responded within  
timescales

A training session regarding investigating and responding to complaints is in the process of being arranged for staff dealing with corporate complaints. It is hoped that this will result in faster turnaround times and better-quality responses.

# Finance

## Areas for Development

Page 118



Percentage of in-year Council Tax collected of the total owed (cumulative)

Collection historically slows down from Q3 onwards. The amount of net debit has significantly increased from the start of the year due to the SPD review and new properties being charged in the second half of the year.



Complaints responded to within timescales

For this reporting period, the complaints team continued to operate with a vacant post and long-term sickness. The vacant post has now been recruited to and staff have returned from long term sickness.



Percentage of in-year national non-domestic rates collected

The Q3 result is disappointing, but action is being taken to focus on collection of the largest outstanding debts in the final quarter of the year.



# Finance

## Comments

### **Q2: Julie Smethurst (*Assistant Director Revenues & Benefits*)**

Performance remains creditable despite ongoing challenges in certain areas. Performance is being impacted mainly due to vacancies, long term sickness and issues that are beyond the control of the teams concerned.

Page  
179

### **Q3: Julie Smethurst (*Assistant Director Revenues & Benefits*)**

Performance remains creditable in terms of council tax collection. Mid-year recharging of previous SPD awards and new properties being brought into the list has raised the level of net debit but includes amounts not yet due to be paid so cannot be reflected in the collection rates this quarter. The largest outstanding business rates debts are being identified for further recovery action in the final quarter of the year.

Signed Off: 23/01/24

## Finance Glossary:

- FOI: Freedom of Information
- EIR: Environmental Information Regulations
- CTR: Council Tax Reduction
- SPD: Single Person Discount

# IT

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Abdul Jabbar

**Officer Contact:** Mark Edgar (Head of IT Operations and Cyber Security)

**Service Summary:**

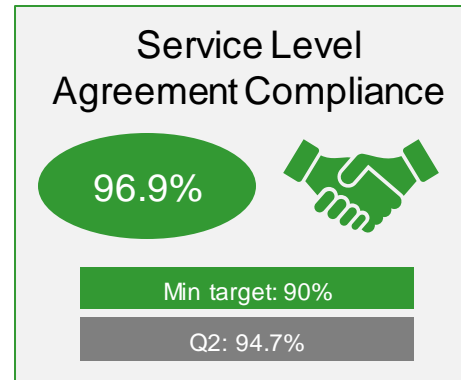
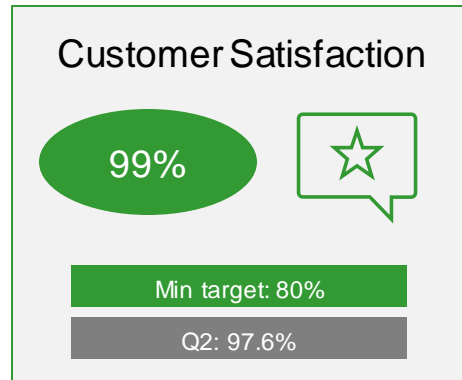
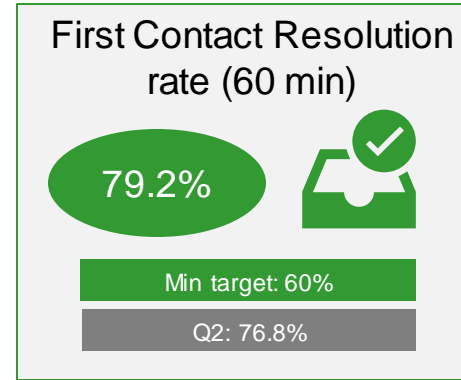
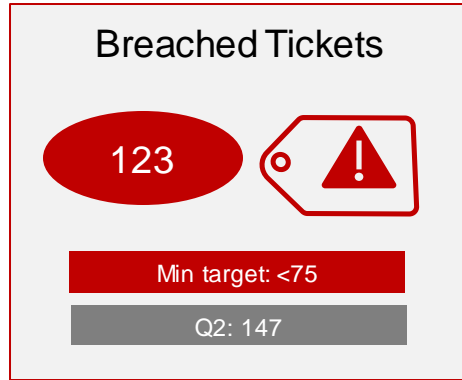
The role of the IT team is to deliver seamless and reliable IT services and projects that drive the success of Oldham Council. IT are committed to enhancing operational efficiency, supporting all departments, and embracing innovation to meet the evolving needs of our organisation.

Page 21

# IT

## Key Metrics

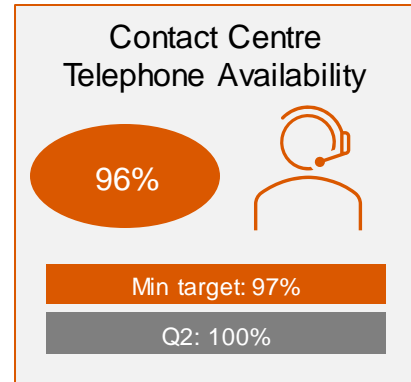
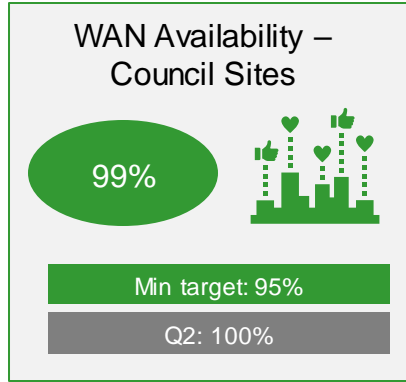
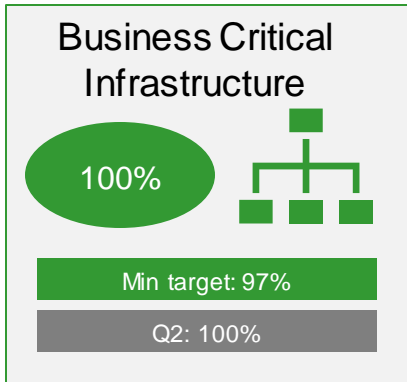
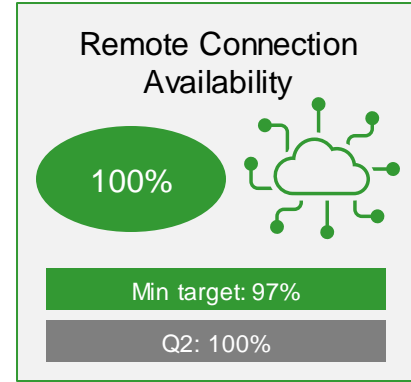
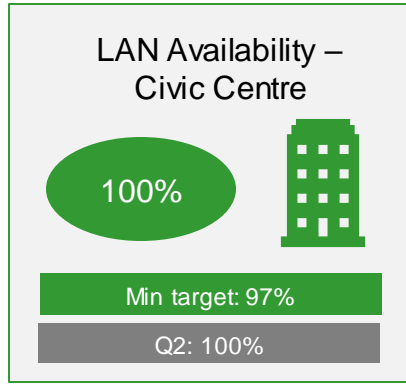
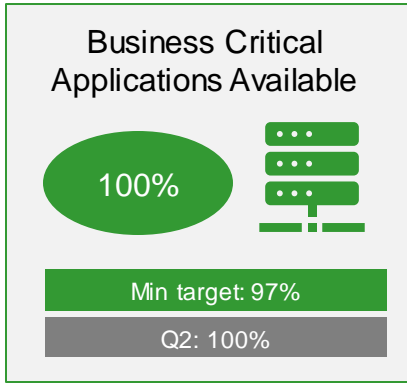
Page 122



# IT

## Key Metrics

Page 123



# IT Successes

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Customer  
Satisfaction

This quarter has seen the highest average customer service so far this year, with over 99%.

# IT

## Areas for Development



### Contact Centre Telephone Availability

Regrettably, November witnessed a decline in our Contact Centre uptime KPI, typically a very stable metric. This was attributed to a third-party update issue, beyond the control of Oldham Council or the IT team to rectify. Barring this external impact, the result would have reached 100%.

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### Breached Tickets

Despite consistent resource limitations, our team has demonstrated improved performance over the quarter. While the challenges with resource allocation persist, our collective efforts have yielded overall better results compared to the previous period. We will continue to strive as we move into 2024 to bring the breached tickets under control.

# IT

## Comments

### **Q2: Mark Edgar** *(Service Assurance and Compliance Manager, Head of IT Operations and Cyber Security)*

The current KPIs for this month are indicative of a challenging operational phase. Our operational landscape demands that our technical resources are predominantly allocated to either operational maintenance or project deliveries, seldom finding the capacity to seamlessly juggle both concurrently. As the IT service stands as a pivotal facilitator for the impending digital council, the growing project workstreams exert an increasingly substantial demand on our resources. This surge, compounded by the summer holiday period, ongoing staff vacancies, and our commitment to resolving lingering legacy tickets, has inevitably impacted our output. While our dedication to driving operational service excellence remains unwavering, it is imperative that we initiate a thorough review of our Target Operating Model. This strategic step is vital in aligning our department's size and structure to the current needs and the imminent demands of the evolving council landscape.

### **Q3: Mark Edgar** *(Service Assurance and Compliance Manager, Head of IT Operations and Cyber Security)*

Despite enduring resource challenges, Quarter 3 showcased commendable resilience in our IT service, who have admirably maintained service levels amid ongoing resource limitations. Our focus on critical transformational projects, notably the migration to the Cloud, and our changes to the network and cyber technologies, have strategically allocated our resources, leaving us to balance operational maintenance against these key project deliverables.

Looking ahead, a comprehensive review of our Target Operating Model is imperative to realign our structure and capabilities with the evolving needs of the council. This strategic initiative will ensure our department remains agile and equipped to meet the growing demands of the dynamic council landscape.

Signed Off: 23/01/24



## IT Glossary:

- WAN: Wide Area Network
- LAN: Local Area Network

# Procurement

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Abdul Jabbar

**Officer Contact:** John Sikora (*Service Intelligence Officer*), Sayyed Osman (*Deputy Chief Executive*)





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### **Service Summary:**

Oldham Council's Commercial Procurement Unit (CPU) provides a professional support service in relation to all areas of external expenditure for the Council. The CPU operates as both an operational and commercial strategic support, linking in with the voluntary sector to maximise the delivery for the local community and protecting the 'Oldham Pound' as much as possible.

# Procurement

## Key Metrics

		Quarter 3	Quarter 2	Target
Number of local direct employees (FTE) hired/retained (re-tendered contracts) on contract for 1 year or the whole contract duration		113	50	N/A
Percentage Council spend in Oldham (12 month rolling)		52.90%	53.20%	55%
Total amount (£) spent in LOCAL supply chain through the contract (OT18)		£2,130,062	£14,705,055	N/A
Total amount (£) spent through contracts with LOCAL micro, small and medium enterprises (MSMEs) (OT19)		£115,030	£2,682,299	N/A

# Procurement Successes

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Percentage  
Council spend in  
Oldham (12  
month rolling)

The measure was pulled lower due to a poor November figure, Decembers month on month increase however was 60.8%

# Procurement

## Areas for Development

Page 131



Total amount (£)  
spent in LOCAL  
supply chain through  
the contract

This measure is now a rolling 12-month figure so that a more accurate comparison can be made.



Total amount (£) spent  
through contract with  
LOCAL micro, small and  
medium enterprises  
(MSMEs)

This measure is now a rolling 12-month figure so that a more accurate comparison can be made

# Procurement Comments

## Q2: Sayyed Osman (*Deputy Chief Executive*)

The quarter 2 update shows we are progressing towards the council's set targets for 2023/24 in what has been a very challenging working environment due to inflation and high interest rates. This has meant we are continuing to have to balance value for money, whilst also attempting to stay true in terms of generating social value, and efficiencies. Also to note the council has improved internal governance by introducing a Strategic Commissioning and Procurement Board that will drive better forward planning.

## Q3: Sayyed Osman (*Deputy Chief Executive*)

We are sustaining the level of local spend even with continued difficulties in the economy. We are continuing to push local spend and also social value within the borough. The newly established Strategic Commissioning and Procurement Board is set to bring a structured and strategic approach to our procurement processes. It will oversee our procurement activities, ensuring they align with our organisational goals and adhere to the best procurement practices.

The Board is anticipated to enhance governance, leading to more transparent, accountable, and effective procurement processes in the future.

Focusing on local spend and social value may present short-term challenges, but it holds the promise of significant long-term benefits. This strategy aims to build a resilient local economy, improve social outcomes, and strengthen community.

Signed Off: 26/01/24

## Procurement Glossary:

- FTE: Full Time Employment
- MSMEs: Micro, Small, Medium Enterprises

# Customer Services

## Performance Measures & Business Plan Report

**Portfolio Holder:** Councillor Jabbar

**Officer Contact:** Pam Siddall (Head of Customer Services)

**Service Summary:**

Customer Services provides the following services:

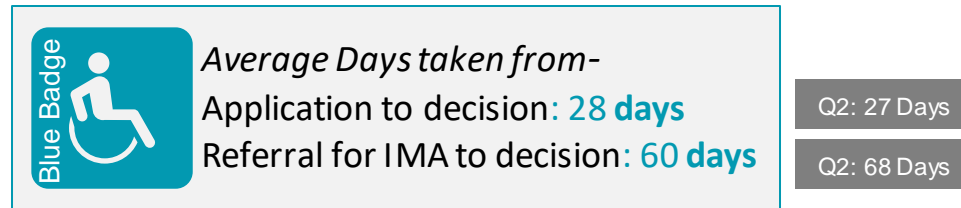
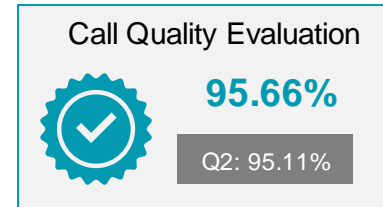
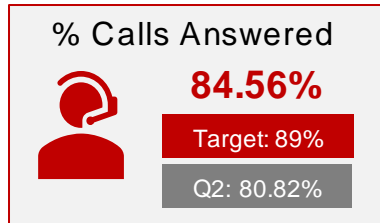
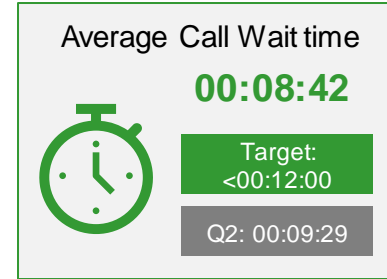
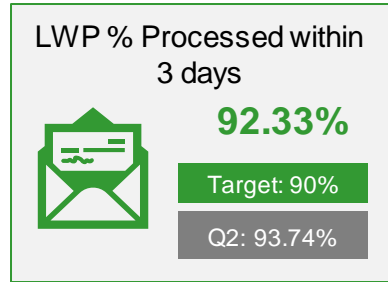
- Customer Support Centre
- Access Oldham & Helpline
- Support & Inclusion
- Welfare Rights
- Blue Badge
- Local Welfare Provision
- Service Development, Systems & Quality



# Customer Services

## Key Metrics

Page 135



# Customer Services

## Average Waiting Times

*Waiting times have reduced for the majority of services in Q2, excluding:*

- Elections  
↑ 00:00:05
- Environment  
↑ 00:02:21
- Highways  
↑ 00:00:29
- Libraries  
↑ 00:00:12
- Payments  
↑ 00:00:10
- Registrars  
↑ 00:00:27
- Street Lighting  
↑ 00:00:07
- Switchboard  
↑ 00:00:04

	Q3	Q2
Average Wait Time: Benefits	00:20:07	0:20:34
Average Wait Time: Blue badge	00:11:01	0:12:40
Average Wait Time: Council Tax	00:18:34	0:19:05
Average Wait Time: Elections	00:03:14	0:03:09
Average Wait Time: ENV Health	00:13:04	0:14:10
Average Wait Time: Environment	00:08:17	0:05:56
Average Wait Time: Highways	00:09:53	0:09:24
Average Wait Time: Housing Options	00:18:17	0:20:19
Average Wait Time: Libraries	00:02:43	0:02:31
Average Wait Time: Payments	00:01:02	0:00:52
Average Wait Time: Pest Control	00:10:37	0:14:14
Average Wait Time: Registrars	00:03:44	0:03:17
Average Wait Time: School Admissions	00:11:38	0:14:11
Average Wait Time: Street Lighting	00:01:59	0:01:52
Average Wait Time: Switchboard	00:00:22	0:00:18
Average Wait Time: Team Oldham Helpline	00:03:38	0:04:08
Average Wait Time: Waste & Recycling	00:13:20	0:14:59

# Customer Services Successes



% Calls  
Answered

Performance improved during the quarter



Customer  
Satisfaction

Performance is maintaining good levels



Call Quality  
Evaluation

Performance is being maintained and learning from reviews is being fed back in real time during checks



Average  
wait time  
on all  
queues

Performance is being maintained with assistance from the automated gate closure if wait times reach unacceptable levels

# Customer Services

## Areas for Development

Page 138



% Calls  
Answered  
(combined  
queues)

Onboarding and training of new staff is underway although we have since lost some established and experienced staff. Housing Options face to face was closed but this resource was redirected to phones to ensure that performance on that line did not drop significantly.

# Customer Services

## Comments

### Q2 Comments: Pam Siddall (Head of Customer Service)

The Customer Support Centre team are still struggling to meet demand pending the joining and training of new staff following recent recruitment. Demand for housing options and pest control is high due to current pressures on those services. Funding has been provided for agency staff dealing with Housing Options queries in Access Oldham only. Overall performance across Customer Services is being maintained with only % calls answered below target at the moment.

### Q3 Comments: Pam Siddall (Head of Customer Service)

The teams have maintained performance during Q3. We continue to work with services to find ways to reduce demand. Although we hope that % of calls answered improves during Q4 due to onboarding and training of staff, we have also lost two experienced members of staff to new roles.

Signed Off: 23/01/24

## Customer Support Glossary:

- CSC: Customer Support Centre
- LWP: Local Welfare Provision
- IMA: Independent Mobility Assessment

# Human Resources & Organisational Development

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Abdul Jabbar

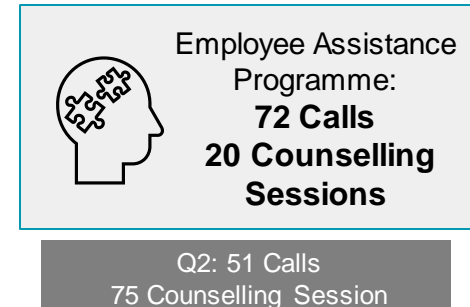
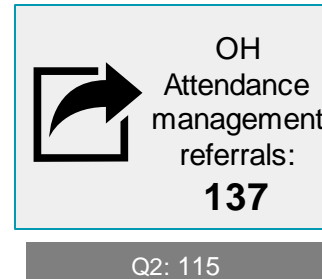
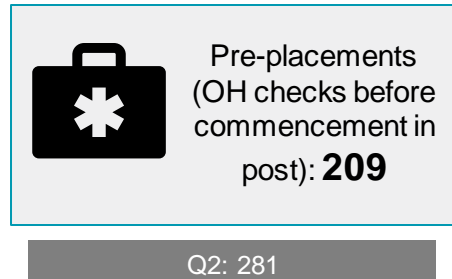
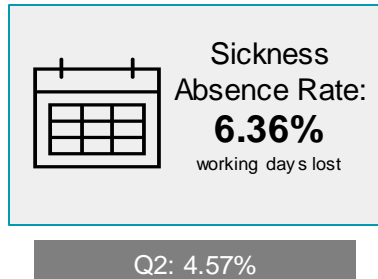
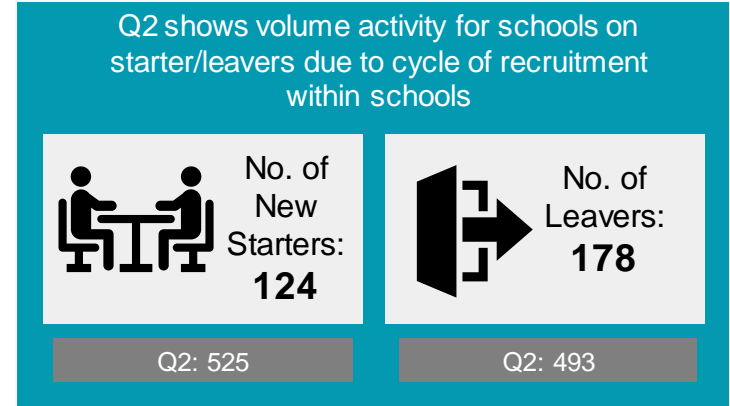
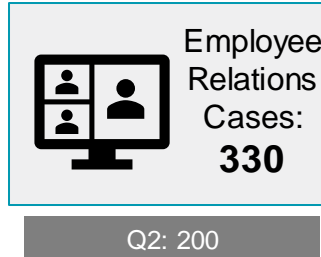
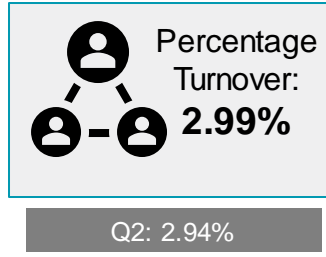
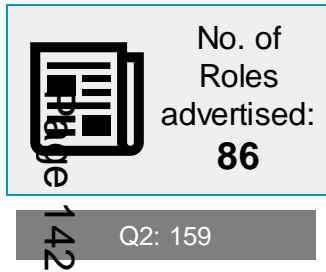
**Officer Contact:** Vikki Morris (Assistant Director of Human Resources and Organisational Development)

**Service Summary:** The service provides a range of workforce related functions that support good employment practice and workforce engagement for the Council and external paying customers

- HR advisory, policy & employee relations
- Job Evaluation
- Recruitment
- Workforce systems, workforce data & statutory workforce reporting
- Payroll, pensions & HR transactional
- Learning & Development
- Apprenticeships
- Workforce Wellbeing
- Organisational development & design
- Employee engagement
- Workforce planning

# HR & OD

## Key Metrics





# HR & OD

## Key Metrics

Page 143

	Quarter 3	Quarter 2
Committed* Levy Spend (cost of 24 apprenticeships) <i>*Spend over the duration of the apprenticeships learning programme</i>	£236,711	£230,289
Expired Levy spend in Q2	£0	£0
Let's Talk compliance/recording (Annual measure 2023/24)	49%	49%
Number of existing apprenticeships (upskilling current workforce)	36	13
Number of new apprenticeships	9	11
% New starters completing MeLearning induction	100%	N/A

# HR & OD

## Successes



% New starters completing MeLearning induction

From 110 new starters, 100% compliance rate - with all 110 new starters completing new online Me learning induction. Please note this differs from 124 new starter figure above as some new starters still progressing through recruitment checks or internal new starters that already completed me learning.

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Let's Talk compliance/recording

Let's Talk recorded and reported annually, therefore data % remains the same as Q2. New cycle Jan-March with promotion, guidance for completion across various communication channels currently taking place Target to increase current completion/recording rate to 70%



Employee Assistance Programme

New cohort of Mental Health First Aiders within the organisation trained that provide point of contact support/listening and signposting to support interventions

# HR & OD

## Areas for Development



Occupational  
Health Pre-  
placement checks

Lower figures compared to Q3 as volume of recruitment for schools is in Sept for pre-employment.



Number of  
roles  
advertised

Following retender, new provider will be in place from Autumn 2024 to host our automatic tracking system (recruitment application process) and recruitment web pages via Greater.jobs. Work will take place over the coming months to improve candidate experience when applying for and being recruited into roles - in addition to continuing to build our Employer Brand through innovative ways of working and technology.



Employee  
Relations  
Cases

103 cases of which 42 are new and 26 cases were closed in that period. **Schools** - 234 cases of which 34 new in the period and 22 closed - included in this number is 127 short term absence meetings support in line with the schools Service Level Agreement. The figure is 160 higher than the last quarter and this can be explained by the school closure period in Q2 as there was nowhere near the same number reviews in Q2 as there in Q3

# HR & OD

## Project Updates

Page 146

- Roll out of bitesize menopause learning, support and information sessions for managers
- Working with Trade Unions on BR1 process
- 3 pay awards (NJC, Soulbury and Teachers) implemented in Dec 23 for Jan 24 pay run
- Awaiting outcome of National Pay negotiations for 2024/25.
- HR school conference took place in October 2023 - Business Managers and Headteachers attended from 60 schools.
- Moving to data mart system for workforce data reporting; this will enable improved reporting functionality - to be in place by April 2024.
- New HR&OD structure implemented; recruitment to vacant posts ongoing and remains a significant challenge
- Staff Survey 2024 to launch 29/01/24 and close on 23/02/24. Results due to be published in April 2024 and will be used to inform key areas of work that supports the workforce strategy

# HR & OD

## Comments

### Q2: Vikki Morris (Assistant Director of Human Resources & Organisational Development)

Increasing demand for HR&OD services from Council services and paying partners continues to place significant pressure on the teams against a backdrop of skills gaps and difficulty recruiting to key roles. The implementation of our new structure should go some way to addressing these challenges, alongside a focused programme of service improvement. The overall focus of the service continues to be providing good people practice support to our stakeholders as well as effective HR transactional services.

### Q3: Vikki Morris (Assistant Director of Human Resources & Organisational Development)

Recruiting to key roles remains a significant pressure within the service. There are positive examples of workforce programmes that are supporting Directorates in achieving their wider workforce priorities and objectives.

Signed Off: 05/02/24

## HR & OD Glossary:

- EAP: Employee Assistance Programme
- Employee relations cases: Employees on formal processes which includes performance improvement, disciplinary, grievance and sickness absence
- OH: Occupational Health
- GMPF: Greater Manchester Pension Fund

# Finance & Corporate Resources

## Portfolio Holder Comment

### Q2: Cllr Abdul Jabbar

The finance and corporate resources portfolio includes a number of key services to ensure this council runs effectively and efficiently, whilst most of the services are not resident facing – with the exception of Customer Services and Revenues and Benefits – the smooth operation of these back-office services is vital to providing value for money for our residents. It is obvious that a number of services are being impacted by vacant posts and we are continuing to work hard at delivering the best services for the Council and for Oldhamers at this challenging time.

### Q3: Cllr Abdul Jabbar

# Communications & Research

## Performance Measures & Business Plan Report

**Portfolio Holder:** Cllr Arooj Shah

**Officer Contact:** Jeni Harvey (*Head of Communications and Research*)

### Service Summary:

The Communications and Research team strategically plans, manages and delivers all communications and research activity for Oldham Council, focused on achieving agreed corporate priorities. Communications and engagement activity is delivered across a range of digital and traditional channels, including through the press, social media, web content, face to face engagement, out of home collateral and more; all tailored to our diverse external and internal audiences and adapted for the channels they use.



## Communications & Research Strategic priorities

We have four agreed strategic priorities for 2023/24.

Page 151  
These will be fully evaluated as new metrics are available in 2024/25.

Interim activity against each of the measurables is detailed on the following slides, followed by a quarterly snapshot of metrics on our key digital channels.

**Increase pride in the borough** from the Resident Survey of 2022/23. In that survey, 74% of respondents said they were satisfied with their local area but only 35% said they would recommend it as a tourist destination. We'll increase these to at least 79% (LGA average) and 40% by the next Resident Survey.

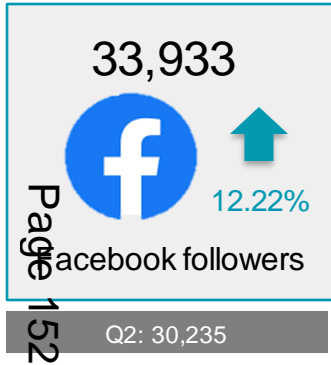
**Increase resident satisfaction with Council communications** - We'll measure this by aiming to reduce the number of people who say they don't receive any information from the Council (21% in the 2022/23 Resident Survey) to less than 20%.

**Improve two-way engagement with our workforce.** In our most recent Staff Survey only 41% of staff said senior management "communicate effectively with me". We aim to improve that to at least 50% by the next Staff Survey via the implementation of a strategic Internal Communications Strategy. The strategy will also act as our 'golden thread' of engagement touchpoints we have with staff in 2023/24.

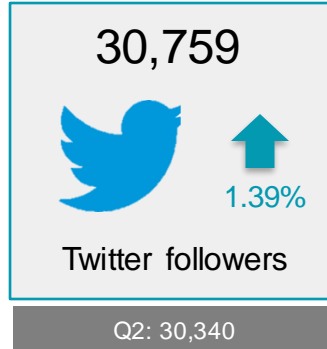
**Manage key reputational** issues in an honest, transparent and people-focused way. We will ensure our residents have access to factual and timely information and enable media to produce fair and balanced reports.

# Communications & Research

## Key Metrics



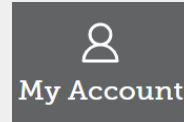
Percentages indicate difference between current performance and the end of the previous quarter.



## Top 5 most viewed web pages

Quarter 3

**Bin collection dates**  
98,972  
*Page views*



**My Account**  
65,883  
*Page views*



**Find a home**  
47,173  
*Page views*



**Rubbish & Recycling**  
42,219  
*Page views*



**Housing**  
40,950  
*Page views*

# Communications & Research

## Progress Against Key Annual Priorities

Increase pride in the borough



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The Christmas Parade and Light Switch on event was held in November, with the parade and switch on elements being combined into one day to reduce costs and staff resource. The event received highly positive feedback across social platforms from residents with many praising the event as one of the best in years. As part of the event, we once again promoted some businesses by pushing specific offers online across our channels. From the research we did, the estimated average spend per person was £38,81 resulting in an estimated event impact of £388,148.

Brass Monkeys in December concluded our Christmas event programme and was a celebration of the very best local and national brass bands providing the perfect musical backdrop for Christmas shopping and celebration. From the research we did, the estimated average spend per person was £18.67 resulting in an estimated event impact of £37,340.

Increase resident satisfaction with Council Communications



We have been receiving increasingly positive feedback on our communications outputs, particularly on social media. This is part of a deliberate strategy to increasingly share good news stories from across the borough and focus on the positive work our teams do every day to help our residents. Examples from the last quarter include regular Instagram reels, as well as Facebook and Instagram posts, on our community-clean ups, tree planting, and work of our Trading Standards teams. A full analysis of resident satisfaction levels will follow in the next full Residents' Survey and be compared against baseline figures from the previous survey.

# Communications & Research

## Progress Against Key Annual Priorities

Improve two-way engagement with our workforce

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We are continuing to roll out our internal communications strategy, with a lot of collaboration work taking place with HR and OD to ensure we are communicating frequently with staff regarding wellbeing and new ways of working.

The distribution list for Managers' Brief has been refreshed, adding over 300 more staff, ensuring the people who need to see the briefing are now receiving it.

With the move to the new Spindles office, we have worked with the project group to ensure staff are fully up-to-date with not only the timings for the move, but video tours, webinars and FAQs - hosted on the intranet and communicated via Team Brief. We also have frequent check-in with Moorhey depot to ensure frontline staff have all relevant communications and it's delivered in a format that suits their working day. We'll continue this in Q4 with the development of Alexandra Park depot.

Managing key reputational issues



Key reputational issues this quarter have been handled proactively and with honesty and transparency; inviting the media for briefings and also issuing statements in a timely fashion to establish the facts and reduce the risk of mis and disinformation circulating. Key issues this quarter have included media enquiries on budgets, roadworks and the appearance in France of missing Oldham teenager Alex Batty.

# Communications & Research

## Comments

### Q2: Jeni Harvey (Head of Communications and Research)

Our Communications and Research service continues to make significant progress towards achieving the agreed priorities for 2023/24. Alongside this progress in our strategic objectives, our measurable reach and engagement also continues to improve across all digital channels, including our residents' newsletter. Our people-focused communications approach, with an increased number of case studies and videos, is already resulting in more positive sentiment online and positive feedback from members of the public on the work the Council is doing.

### Q3: Jeni Harvey (Head of Communications and Research)

Good progress continues to be made by the Communications and Research service in achieving our agreed priorities for 2023/24. Our measurable reach and engagement also continues to improve week on week and month on month, as evidenced through our weekly Reputation Tracker. Sharing good news stories and positive updates from across our borough continues to build positive sentiment on all digital channels; while we are also increasing our targeted communications around the political priority areas of economy, education, environment, housing and health.

Signed Off: 02/02/24

# Communications & Research

## Portfolio Holder Comment

### Q2: Cllr Arooj Shah

A strong communications output is vital to engaging with our residents all year round, in the modern media landscape we are seeing a growing use of non-traditional communications channels (social media rather than local newspapers for example) and I'm pleased to see the renewed focus on people centred stories is paying off and our residents understanding of what services the Council offers to them is increasing.

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### Q3: Cllr Arooj Shah

Signed Off: \_\_\_\_\_  
*DD/MM/YY*

**Report to Governance, Strategy and Resources  
Scrutiny Board**

## **Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3 – December 2023**

**Portfolio Holder:** Councillor Abdul Jabbar MBE, Cabinet  
Member for Finance & Corporate Resources

**Officer Contact:** Sarah Johnston, Director of Finance

**Report Author:** Sarah Johnston, Director of Finance

**21 March 2024**

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### **Reason for Decision**

The report provides the Governance, Strategy and Resources Scrutiny Board with an update on the Council's 2023/24 forecast revenue budget position at Annex 1 and the financial position of the capital programme as at 31 December 2023 (Quarter 3) together with the revised capital programme 2023/24 to 2027/28, as outlined in section two of the report at Annex 2.

### **Executive Summary**

#### **Revenue Position**

The forecast outturn position for 2023/24 is a projected adverse variance of £16.642m after allowing for approved and pending transfers to and from reserves.

There are significant variances contained within the projected net overspend within three areas forecasting pressures:

- Children's Services is forecasting a pressure of £14.240m
- Place and Economic Growth is forecasting a pressure of £5.442m; and
- Community Health and Adult Social Care is forecasting a pressure of £0.864m

These will continue to be closely monitored for the remainder of the financial year with action taken to address variances and take mitigating action as detailed in the report.

Favourable variances across the remaining portfolios totalling £3.903m are offsetting these pressures in these three areas.

An update on the major issues driving the projections is detailed within Annex 1, Section 2.

The forecast pressure of £16.642m at Quarter 3 is an increase of £0.449m on the adverse position of £16.194m reported at Month 8. Management actions that have been approved to review and challenge planned expenditure, control recruitment and to maximise income will hopefully have an impact on the anticipated the outturn deficit position.

Information on the Quarter 3 position of the Dedicated Schools Grant (DSG), Housing Revenue Account (HRA) and Collection Fund is also outlined in the report.

As reported previously, the position on the DSG continues to improve and as at month 9 it is forecasting an in-year surplus of £2.117m, with an estimate that the year-end position will be a surplus of £3.561m. Action will continue to be taken with the aim of mitigating cost pressures and delivering and maintaining a surplus position. To assist, Oldham is taking part in the Department for Education sponsored Delivering Better Value in SEND (Special Educational Needs and Disabilities) which will provide dedicated support for the SEND Review reforms to 55 Local Authorities with historical DSG deficit issues with the aim of putting the DSG of participating Authorities on a more financially sustainable footing.

There are currently no significant issues of concern in relation to the HRA.

The Collection Fund is forecasting an in-year surplus of £0.707m. The Collection Fund is particularly volatile, whilst currently in surplus the position will continue to be closely monitored throughout the year as any surplus or deficit at the end of the financial year will have a direct budgetary impact in 2024/25.

### **Capital Position**

The report outlines the most up to date capital spending position for 2023/24 to 2028/29 for approved schemes. The revised capital programme budget for 2023/24 is £79.466m at the close of month 9, a net decrease of £30.839m from the original budget of £110.305m. Actual expenditure to 31 December 2023 was £52.765m (66.40% of the forecast outturn).

It is likely that the forecast position will continue to change as the year draws to a close with additional re-profiling into future years.



## **Recommendations**

That the Governance, Strategy and Resources Board considers:

1. Forecast revenue outturn for 2023/24 at Quarter 3 being a £16.642m adverse variance.
2. Forecast positions for the Dedicated Schools Grant, Housing Revenue Account and Collection Fund.
3. Revised capital programme for 2023/24 and the forecast for the financial years to 2027/28 as at Quarter 3.

**Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3 – December 2023****1 Background**

- 1.1 The Authority's 2023/24 revenue budget and capital programme was approved by Council on 1 March 2023. Under established budget procedures, all services are required to monitor and review their approved revenue and capital budgets during the financial year. This is reported to Cabinet (and this Board) on a quarterly basis with this additional report at month 8 which is used to inform the budget setting process for the following financial year.
- 1.2 As part of the budget monitoring process, the forecast year-end position for revenue and capital has been prepared by all services as follows:
- a) The revenue forecast is based on a comparison of profiled budgets to the actual position as at the end of Month 8 together with known commitments, issues
  - b) The capital programme forecast has been based on notified revisions to the approved 2023/24 position including the final 2022/23 outturn, new grant notifications and an initial rephasing of the approved capital programme and the Annual Review.
- 1.3 As the year progresses the outturn projections will reflect the evolving position of management actions put in place to mitigate in-year pressures, new developments and changes in the profile of planned expenditure and of course any additional support that the Government may provide.
- 1.4 As previously reported the financial reporting structure of the Council has been revised for 2022/23 and both the revenue and capital positions are presented in the revised format.

**2. Current position**

- 2.1 The forecast revenue outturn for 2023/24 is an adverse variance of £16.642m compared to £16.194m at month 8. Further details of the current revenue budget position and a full description of the forecast can be found in Annex 1.
- 2.2 Table 1 below shows the year-end forecast position against budget for each Portfolio after the application of a net planned transfer of £11.638m to and from reserves. This represents an adverse movement of £0.449m compared to the position reported at Month 8.
- 2.3 The significant forecasted adverse variances at month 8 are within Children's Services, Community Health an Adult Social Care and Place and Economic Growth Directorates. Children's Services is reporting a pressure of £14.240m (£13.386m at month 8), Community Health an Adult Social Care which is reporting an adverse variance of £0.864m (£0.815m at month 8) and there is a further significant pressure within the Place and Economic Growth Directorate which is forecasting a £5.442m adverse variance (£5.312m at month 8)
- 2.4 The forecast overspends are offset by a series of favourable variances totalling £3.903m being reported within; Capital, Treasury and Corporate Accounting (£1.509m, unchanged from month 8), £0.327m within Public Health (£0.305m at month 8), £0.346m within Communities (£0.194m at month 8) and £1.721m within Corporate Services (£1.310m at month 8).

2.5 It is important to note that eight 2023/24 approved budget reductions totalling £1.403m will not to be achieved and are therefore rated 'Red. In addition, one further reduction is rated 'Amber/ Red - with £0.040 of a possible £0.060m forecast not to be achieved. Further details are provided in section 3. In addition, there are a further two Budget Reductions with a combined value of £0.880m rated 'Amber. These are expected to be delivered by year end. Therefore, £1.443m of the projected adverse variance in table 1 is due to the failure to deliver budget reductions.

2.6 The table below shows the forecast Quarter 3 (December) revenue outturn position.

	Budget	Forecast	In Year Transfer To/ (From) Reserves	Variance Month 9	Variance Month 8
	£000	£000	£000	£000	£000
Community Health and Adult Social Care	79,302	83,089	(2,924)	864	815
Children's Services	69,981	87,463	(3,242)	14,240	13,386
Public Health	24,342	25,949	(1,933)	(327)	(305)
Communities	9,030	9,039	(355)	(346)	(194)
Place and Economic Growth	60,089	67,278	(1,748)	5,442	5,312
Corporate Services	30,318	28,597	-	(1,721)	(1,310)
Capital, Treasury and Technical Accounting	25,788	25,714	(1,436)	(1,509)	(1,510)
<b>NET EXPENDITURE</b>	<b>298,850</b>	<b>327,130</b>	<b>(11,638)</b>	<b>16,642</b>	<b>16,194</b>
<b>FINANCED BY:</b>					
Collection Fund Surplus	(4,130)	(4,130)	-	-	-
General Use of Reserves	(12,786)	(12,786)	-	-	-
Transfer to Earmarked Reserves - Business Rates Retention Pilot Gain	1,209	1,209	-	-	-
Other Financing	(283,144)	(283,144)	-	-	-
<b>TOTAL FINANCING</b>	<b>(298,851)</b>	<b>(298,851)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>NET FORECAST VARIANCE</b>	<b>-</b>	<b>28,280</b>	<b>(11,638)</b>	<b>16,642</b>	<b>16,194</b>

2.7 As this financial monitoring report reflects the financial position at Quarter 3 (Month 9), it can be regarded as an indication of the year end position. Every effort will be made to further reduce the forecast variance by the year end to mitigate any potential impact on the 2024/25 budget.

2.8 The original approved capital programme for 2023/24 totalled £110.305m. The revised capital programme as at month 9 taking account of approved carry forwards, approved new funding, new schemes and variations and proposed variations/ re-phasing gives projected revised expenditure of £79.466m. Actual expenditure at month 9 was £52.765m (66.40% of the forecast outturn). Further details of expenditure and schemes within the capital programme can be found in Annex 2.

### 3 Options/Alternatives

3.1 The options that the Governance, Strategy and Resources Scrutiny Board might consider in relation to the contents of this report are;

- a) to consider the forecast revenue and capital positions presented in the report including proposed changes
- b) to propose alternative forecasts

#### **4 Preferred Option**

4.1 The preferred option is that the Governance, Strategy and Resources Scrutiny Board considers the forecasts and changes within this report; option (a) at 3.1.

#### **5 Consultation**

5.1 Consultation with the services within the Council and the Director of Finance.

#### **6 Financial Implications**

6.1 The full financial implications are detailed in the report.

#### **7 Legal Services Comments**

7.1 There are no legal issues at this time.

#### **8 Co-operative Agenda**

8.1 Improving the quality and timeliness of the financial information available to citizens of Oldham supports the co-operative ethos of the Council.

8.2 The revenue budget and capital strategy/ programme have been prepared so that they embrace the Council's co-operative agenda with resources being directed towards projects that enhance the aims, objectives and co-operative ethos of the Council. Ongoing budget monitoring is key to ensuring this objective is met.

#### **9 Human Resources Comments**

9.1 There are no Human Resource implications.

#### **10 Risk Assessments**

10.1 The risk is that the proposed management actions are not achieved in full. Should this be the case then alternatives will be sought and implemented.

#### **11 IT Implications**

11.1 There are no IT implications.

#### **12 Property Implications**

12.1 There are no Property implications.

#### **13 Procurement Implications**

13.1 There are no Procurement implications.

#### **14 Environmental and Health & Safety Implications**

14.1 There are no Environmental and Health and Safety implications.

#### **15 Equality, Community Cohesion and Crime Implications**

15.1 There are no Equality, Community Cohesion and Crime implications.

#### **16 Implications for Children and Young People**

16.1 There are no direct implications for Children and Young People

**17 Equality Impact Assessment Completed**

17.1 Not Applicable.

**18 Key Decision**

18.1 Yes

**19 Key Decision Reference**

19.1 FLC-07-23

**20 Background Papers**

20.1 The following is a list of background papers on which this report is based in accordance with the requirements of Section 100(1) of the Local Government Act 1972. It does not include documents which would disclose exempt or confidential information as defined by the Act:

File Ref: Revenue Background Papers are contained in Annex 1 including Appendices 1 and 2.

Officer Name: Lee Walsh  
Contact: lee.walsh@oldham.gov.uk

File Ref: Capital Background Papers are contained in Annex 2 including Appendices A to I

Officer Name: James Postle  
Contact No: James.Postle@oldham.gov.uk

**21 Appendices**

**Annex 1 Revenue Budget Monitoring Report 2023/24 Quarter 3 (Month 9) – December 2023**

Appendix 1 Financing of the 2022/23 Revenue Budget at Month 9  
Appendix 2 Analysis of Grants

**Annex 2 Capital Investment Programme Report 2023/24 Month 9 – December 2023**

Appendix A SUMMARY – Month 9 - Community Health & Adult Social Care

Appendix B SUMMARY – Month 9 - Children’s Services

Appendix C SUMMARY – Month 9 - Communities

Appendix D SUMMARY – Month 9 - Place and Economic Growth

Appendix E SUMMARY – Month 9 - Housing Revenue Account (HRA)

Appendix F SUMMARY – Month 9 – Corporate/ Information Technology

Appendix G SUMMARY – Month 9 - Capital, Treasury and Technical Accounting

Appendix H SUMMARY – Month 9 - Funds for Emerging Priorities

Appendix I SUMMARY – Month 9 - Proposed Variations

# ANNEX 1

## REVENUE BUDGET MONITORING REPORT 2023/24

### Quarter 3 – December 2023

#### 2 Background

2.1 The Authority's 2023/24 revenue budget was approved by Council on 1 March 2023 at a sum of £287.051m incorporating:

- The use of £4.130m of surplus Collection Fund resources to support the 2023/24 revenue budget;
- Budget Reductions approved in 2021/22 and 2022/23 resulting in a budgetary impact of £3.655m for 2023/24;
- £16.313m of Budget Reductions approved within the 2023/24 budget;
- £12.786m use of corporate and specific reserves with an offsetting transfer to reserves of £1.209m reflecting the requirement, under the Business Rates Retention Pilot scheme, to pay the Greater Manchester Combined Authority a share of Retained Business Rates income; and
- £2.600m of capital receipts in line with the flexibilities agreed by Secretary of State for Levelling Up, Housing and Communities.

2.2 Under established budget procedures all services are required to monitor and review their approved budgets during the financial year. As part of this process, a forecast of the year-end position has been prepared by all services. The forecast is based on a comparison of profiled budgets to the actual position as at the end of month 9 together with known commitments, issues and planned management actions.

2.3 Unlike 2022/23 when £12.000m of corporate resources were held to offset costs arising from the legacy of the COVID-19 pandemic, the budget for 2023/24 has been prepared so that anticipated COVID legacy costs are consolidated within the mainstream budgets of Children's Social Care and Community Health and Adult Social Care.

#### 3 Current Position

3.1 The current net revenue budget of £298.852m represents an increase of £11.801m against the originally approved budget of £287.051m and an increase of £2.000m from the £296.852m reported at month 8. This increase is due to the utilisation of capital grants reflecting the reporting arrangements when preparing the Statement of Accounts. A full funding analysis can be found at Appendix 1.

3.2 The current position for 2023/24 at Month 9 is a projected adverse variance of £16.642m. This represents an adverse movement of £0.449m compared to the position reported at Month 8 (£14.194m). The year-end position has been prepared by all services and section 8 provides more detail about the approved and planned

use of reserves at month 9. The table below shows the year-end forecast position against budget for each Portfolio.

**Table 1 – Summary Forecast Revenue Outturn**

	Budget	Forecast	In Year Transfer To/ (From) Reserves	Variance Month 9	Variance Month 8
	£000	£000	£000	£000	£000
Community Health and Adult Social Care	79,302	83,089	(2,924)	864	815
Children's Services	69,981	87,463	(3,242)	14,240	13,386
Public Health	24,342	25,949	(1,933)	(327)	(305)
Communities	9,030	9,039	(355)	(346)	(194)
Place and Economic Growth	60,089	67,278	(1,748)	5,442	5,312
Corporate Services	30,318	28,597	-	(1,721)	(1,310)
Capital, Treasury and Technical Accounting	25,788	25,714	(1,436)	(1,509)	(1,510)
<b>NET EXPENDITURE</b>	<b>298,850</b>	<b>327,130</b>	<b>(11,638)</b>	<b>16,642</b>	<b>16,194</b>
<b>FINANCED BY:</b>					
Collection Fund Surplus	(4,130)	(4,130)	-	-	-
General Use of Reserves	(12,786)	(12,786)	-	-	-
Transfer to Earmarked Reserves - Business Rates					
Retention Pilot Gain	1,209	1,209	-	-	-
Other Financing	(283,144)	(283,144)	-	-	-
<b>TOTAL FINANCING</b>	<b>(298,851)</b>	<b>(298,851)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>NET FORECAST VARIANCE</b>	<b>-</b>	<b>28,280</b>	<b>(11,638)</b>	<b>16,642</b>	<b>16,194</b>

3.3 There are significant variances contained within the projected net overspend. There are currently three areas which are forecasting pressures at month 9;

- Children's Services is forecasting a pressure of £14.240m, the most significant contributing factor to the adverse variance;
- Place and Economic Growth is forecasting a pressure of £5.442m; and
- Community Health and Adult Social Care is forecasting a pressure of £0.864m.

The forecast overspends are offset by a series of favourable variances totalling £3.904m being reported within; Capital, Treasury and Corporate Accounting (£1.509m, no change from month 8), £0.327m within Public Health (£0.305m at month 8), £0.346m within Communities (£0.194m at month 8) and £1.721m within Corporate Services (£1.310m at month 8).

More information on these variances is provided in summary in the following paragraphs and in detail in Section 3.

3.4 It is important to note that eight 2023/24 approved budget reductions totalling £1.403m will not to be achieved and are therefore rated 'Red. In addition, one further reduction is rated 'Amber/ Red - with £0.040 of a possible £0.060m forecast not to be achieved. Further details are provided in section 3. In addition, there are a further two Budget Reductions with a combined value of £0.880m rated 'Amber. These are expected to be delivered by year end. Therefore, £1.443m of the projected adverse variance in table 1 is due to the failure to deliver budget reductions.

- 3.5 In view of the projected and increasing adverse variance, Management instruction have been put in place to address the overspending, namely:
- management actions across all service areas to review and challenge planned expenditure and to maximise income;
  - processes to monitor the recruitment of staff to vacant posts and significant items of expenditure; and
  - ensuring non-essential expenditure is minimised.

In effect this is a continuation of actions that were initiated last year (and previous years), however, the variance at month 9 and throughout 2023/24 is much more significant than that at any point during 2022/23. It is therefore essential that this approach is rigorously applied and where possible, any transformation programme projects linked to savings are accelerated.

- 3.6 The effectiveness of management action and corporate procedures will continue to be closely monitored by Management Teams right up to the end of the financial year. Management action should ease the overall financial pressures, and the impact of such action will be reported in the final outturn report.

### 3 Portfolio Summaries

#### 3.1 Community Health and Adult Social Care

- 3.1.1 The Portfolio provides social care support to adults and carers across Oldham with a key aim of integrating and aligning the work with health partners to achieve greater efficiency in service delivery and better outcomes for the resident or patient. This covers both the commissioning and the provision of services. The following table shows the forecast position for the Portfolio at month 9.

**Table 2 – Community Health and Adult Social Care- Forecast Outturn**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Clusters	3,098	2,964	-	(134)
Commissioning	17,963	19,196	(1,500)	(267)
Community Business Services	1,177	1,514	(797)	(460)
Community Health & Social Care	28,400	29,286	-	886
Director Adult Social Care	1,916	2,359	(627)	(185)
Learning Disability	15,888	16,572	-	685
Mental Health	9,846	10,187	-	341
Safeguarding	1,013	1,010	-	2
<b>Total Forecast Net Expenditure</b>	<b>79,302</b>	<b>83,088</b>	<b>(2,924)</b>	<b>863</b>

#### Summary

- 3.1.2 The Portfolio has a projected overspend of £0.863m, an increase of £0.049m compared to the £0.815m reported at month 8 and incorporates the use of reserves of £2.924m.



- 3.1.3 Short stay provision that has been repurchased as permanent placements following Care Act reassessments which has resulted in a significant number of residential and nursing care packages becoming a long-term requirement which has consequently presented the service with an increase of backdated and previously unbudgeted costs.

#### Clusters

- 3.1.6 The Cluster service area is reporting an underspend forecast position of £0.134m previously forecast at £0.076m at month 8. The variance relates to vacant posts, mostly Social Worker posts across the service.

#### Commissioning

- 3.1.7 The service at month 9 is reporting a forecast underspend of £0.267m an increase of £0.251m from the underspend position of £0.051m as at month 8. The reduction in costs relates primarily to the Millbrook contract for community equipment where there has been a further decrease in activity (£0.231m). The service also has a number of vacant posts following a restructure that have not been recruited to resulting in an underspend of (£0.203m), this combined with efficiencies in the ASC contract management fees (£0.125m) and an increase in income for helpline (£0.054m) has increased the underspend position. These underspends are offset by pressures on the core Supported Living contracts (£0.134m) and the cost for a temporary team of Social Workers deployed to undertake emergency Care Act assessments linked to establishment of Oldham Total Care.

#### Community Business Services

- 3.1.8 Community Business Services is forecasting a £0.460m underspend. The variance is made up from vacant posts (£0.432m), which are partially offset against agency costs and other employee expenses £0.142m. There is also the recovery of unbudgeted income from deferred payments (£0.184m) and additional income from the CF grant totalling (£0.048m), but this is offset by overspends for the Civica contract and other non-pay expenditure totalling £0.062m. The Reform and Improvement Programme forms part of this Service Area and is fully funded from reserves with an expected drawdown in 2023/24 of £0.797m. An updated report was presented to Management Board outlining the programmes revised priorities and the implications of the Care Quality Commission statutory reforms.

#### Community Health and Social Care

- 3.1.9 The CHASC service area is projecting an overspend of £0.886m which is an adverse movement of £0.400m compared to month 8. The variance relates to increased cost pressures within residential care placements of £0.382m and increased activity for home care packages of £1.038m. This, in part, is being offset by vacant posts within the IDT and Sensory Teams of (£0.115m) and over achievement against residential & short stay income targets of (£1.138m), due to a high volume of outstanding financial assessments being completed by an external agency. As operational teams continue to work through backlogs the service has seen an increase in the number of short stay placements becoming permanent. The main movement relates to individuals with physical support.

## Director of Adult Social Care (DASS)

- 3.1.10 When compared to Month 9 there is a favourable movement of £0.179m which results in a forecast underspend of £0.185m at month 9. The variance is a result of an increase in vacant posts and an increase in staffing recharges that total £0.185m.

### Learning Disability

- 3.1.11 The Learning Disability service is forecasting an adverse variance of £0.685m, which is an increase of £0.388m compared to month 8. The overspend is mainly due to the increase in demand in homecare at £0.260m and supported living at £0.336m, direct payments, nursing and shared lives at £0.094m which has been mitigated slightly by a reduction in residential, short stay and respite care at (£0.116m). In addition, there are 14 vacant posts which has resulted in a forecasted underspend in salaries of (£0.044m) and an increase of CHC income of (£0.145m).

### Mental Health

- 3.1.12 The Mental Health (MH) service is projecting an overspend of £0.341m an increase of £0.029m compared to month 8. The increase in costs is due to backdated payments and the rising number of individuals in residential care at £0.308m, nursing care at £0.451m, Direct Payments at £0.042m and Supported Living of £0.108m. The increase in CHC contribution to care (£0.593) and the decrease of (£0.289m) in salary costs has offset the increase in costs.

### Safeguarding

- 3.1.13 Safeguarding is reporting a minor adverse variance of £0.002m with favourable variances within the Safeguarding Team of £0.028m and Safeguarding Board £0.009m counteracting a £0.039m overspend in the MASH Team.

### Achievement of Budget Reductions

- 3.1.14 The Portfolio has approved Budget Reductions of £3.574m in 2023/24 all of which are fully delivered.

## 3.2 Children's Services

- 3.2.1 The following table shows the forecast position after the approved and planned use of reserves for the Portfolio as at month 9.

**Table 3 – Children's Services**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Children's Social Care	54,439	68,056	(269)	13,348
Education, Skills & Early Years	12,031	14,714	(1,792)	890
Preventative Services	3,551	4,733	(1,182)	0
Schools	(39)	(39)	-	0
<b>Total Forecast Net Expenditure</b>	<b>69,981</b>	<b>87,463</b>	<b>(3,242)</b>	<b>14,240</b>

## Summary

- 3.2.2 The Portfolio has a projected overspend £14.240m an increase of £0.853m on the £13.386m reported at month 8, incorporating a £2.305m use of reserves. The principal underlying reasons are detailed in the following paragraphs.

### Children's Social Care

- 3.2.3 This Directorate is projecting a £13.348m overspend at month 9 compared to £12.496m overspend at month 8 the forecast incorporates a £0.269m use of reserves; an increase of £0.8524m. The principal underlying reasons are detailed below.

### Children in Care

- 3.2.4 Children's in Care is reporting an adverse variance of £11.163m, a deterioration of £1.487m from the £9.676m reported at month 8. An increase in placements costs of £1.319m is driven by increases in Out of Borough/ Residential care (£0.890m) and Semi-independence (£0.217m).

### Children's Fieldwork and Family Support

- 3.2.5 The area is forecasting a pressure of £2.803m a reduction of £0.170m compared to the month 8 position of £2.973m. It should be noted that the Children's Social Care Integration Management Costs and Business Support service areas, with a combined underspend of £0.468m have transferred to the newly created Children's Service Integration. There is a net overspend of £2.388m on staffing costs, in addition, there are pressures for no recourse to public funds £0.124m, assistance to families grants £0.203m and legal fees £0.075m with other minor variances totalling £0.013m accounting for the remainder.

### Children's Safeguarding

- 3.2.6 The area is reporting a favourable variance of £0.301m compared to £0.154m at month 8, the improvement of £0.147m is due to the transfer of the Data and Performance team (with a corresponding forecast overspend of £0.151m) to the newly created 'Children's Services Integration' service area. The residual underspend of £0.154m is due to delays in recruiting to established posts.

### Children's Services Integration

- 3.2.7 A newly created service are with services and budgets being transferred from Fieldwork and Family Support and Children's Safeguarding as referenced in sections 3.2.5 and 3.2.6, with a net favourable variance of £0.317m
- 3.2.8 Against a backdrop of increased demand nationally and particularly in the North West, factors such as poverty, deprivation, the legacy of the pandemic, and cost of living crisis continue to have a significant impact on the ability of children and young people in Oldham to enjoy a happy, healthy, and safe childhood. The main pressures that have carried forward into 2023/24 and which are driving the current financial position are the number and cost of children placed out of borough and the continued reliance on agency staff to address additional demand and also to help maintain a fully established workforce. The hourly rates paid to staff engaged

in this manner have significantly increased in the last two years. Disappointingly, the projected overspend is despite the significant additional funding of £14.700m that has been invested in the service for the current financial year; £11.800m intended to stabilise the financial position with further one-off, net investment of £2.900m funded from reserves to pump prime a number of invest to save initiatives aimed at improving services but also delivering budget reductions over the period to 2028/29.

3.2.9 Whilst it is acknowledged that demand cannot be wholly controlled, Senior Management is dedicated to addressing the issues affecting the service. The Children's Transformation Programme (CTP) has been set up in order to drive forward the operational changes required and to facilitate delivery of the invest to save initiatives. Governance of the programme is through the CTP board, chaired by the Managing Director of Children and Young People. The programme consists of six strands of activity, as outlined below:

- Placement Sufficiency;
- Workforce;
- Early Intervention and Prevention;
- Children and Young People's Mental Health;
- Speech, Language and Communication; and
- SEND Improvement.

3.2.10 The overall impact of the transformation programme will continue to be monitored, however, it is important to note that should the current level of overspending remain unaddressed and continue, it will have a significant budgetary implication for 2024/25 and beyond as well as reduce the overall financial resilience of the Council.

#### Education, Skills and Early Years

3.2.10 The area is reporting a £0.890m pressure, including the use of reserves totalling £1.792m. The position is unchanged from the previous month.

3.2.11 The main pressure within this service area remains in relation to home to school transport; £1.183m which includes non-delivery of a related budget reduction with a value of £0.372m. The service is reviewing the current model and new routes with a tendering exercise for the start of the academic year. There is a further pressure of £0.040m in relation to fees received for supporting schools through the process of converting to an academy. Both the pressures are linked to the non-delivery of a related budget reduction as referred to in section 3.2.13 below. The overspend is netted down by a series of predominantly staffing related favourable variances throughout the Portfolio with a total, net value £0.333m.

#### Preventative Services

3.2.12 The area is incorporating a use of reserves totalling £1.182m and continues to forecast a balanced outturn as at Month 9.

#### Achievement of Budget Reductions

3.2.13 Budget reductions for the Directorate in 2023/24 total £1.133m of which £0.721m are rated 'Green– Has / is expected to be fully delivered'. The Budget Reduction;

School Support- Academisation (£0.060m) is currently rated 'Amber/ Red – being closely monitored in year with elements expected not to be delivered' with £0.040m currently forecast not to be achieved. In addition, the budget reduction 'Special Education Needs and Disability (SEND) Education Provision' with a value of £0.372m is now rated Red- will not / is not expected to be delivered in full' as a consequence of being linked to the pressure in relation to home to school transport (as advised as 3.5).

### 3.3 Public Health

3.3.1 The following table shows the forecast position after the approved and planned use of reserves for the Portfolio at month 9.

**Table 4 – Public Health**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Public Health (Client & Delivery)	19,650	20,471	(1,138)	(317)
Leisure Services	4,692	5,478	(796)	(10)
<b>Total Forecast Net Expenditure</b>	<b>24,342</b>	<b>25,949</b>	<b>(1,934)</b>	<b>(327)</b>

#### Summary

3.3.2 The Portfolio has a projected underspend of £0.327m and incorporates the use of reserves of £1.934m. The principal underlying reasons are detailed below.

3.3.3 Public Health (Client and Delivery) is showing an underspend of £0.317m as at month 9 which is due to slippage on staffing costs and eligible staffing costs being charged to the Contain Outbreak Management Fund (COMF) grant, which in the main accounts for the majority of the reserves. The grant as first received in 2021/22. It has been possible to carry forward this grant into 2023/24 and 2024/25. The additional expenditure would not be incurred without the availability of this grant funding,

3.3.4 The Leisure Services is reporting an underspend of £0.010m at month 9 compared to a break-even position as at month 8.

#### Achievement of Budget Reductions

3.3.5 Budget reductions for the Directorate total £0.544m of which £0.534m are rated 'Green – Has / is expected to be fully delivered'. The Budget Reduction 'School Swimming Service' with a value of £0.010m is rated 'Red – will not / is not expected to be delivered in full.

### 3.4 Communities

3.4.1 The following table shows the forecast position after the approved and planned use of reserves for the Portfolio at Month 9.

**Table 5 – Communities**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Community Services	2,461	2,311	(300)	(451)
Heritage, Libraries and Arts	5,809	5,875	(55)	11
Youth Service Client	759	853	0	93
<b>Total Forecast Net Expenditure</b>	<b>9,030</b>	<b>9,039</b>	<b>(355)</b>	<b>(346)</b>

### Summary

- 3.4.2 The Portfolio has a projected underspend of £0.346m (£0.194m at month 8) and incorporates and incorporates a net use of reserves totalling £0.571m.

#### Community Services

- 3.4.3 The area is reporting an underspend of £0.451m at month 9 which relates to vacancies in the District Partnerships team.

#### Heritage Libraries and Arts

- 3.4.4 The service is reporting an overspend of £0.011m compared to £0.072m at month 8, which relates to reduced pressures on staffing costs and non-pay costs (operational materials)

#### Youth Services Client

- 3.4.5 The service is reporting an overspend of £0.093m at month 9. There is an ongoing income pressure of £0.109m within Outdoor Education which is offset in part by the generation of additional income in Youth Services and eligible staff time charged to the Homes for Ukraine grant.

### Achievement of Budget Reductions

- 3.4.6 The single Budget Reductions for the Directorate has a value of £0.060m and is rated 'Green – Has / is expected to be fully delivered'.

## 3.5 Place and Economic Growth

- 3.5.1 The following table shows the forecast position after the approved and planned use of reserves for the Portfolio at month 9.

**Table 6 – Place and Economic Growth**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Economy	3,949	10,400	(1,802)	4,650
Environmental Services	56,140	56,879	54	792
<b>Total Forecast Net Expenditure</b>	<b>60,090</b>	<b>67,278</b>	<b>(1,748)</b>	<b>5,441</b>

## Summary

- 3.5.2 The Portfolio has a projected overspend of £5.441m (£5.312m at month 8) and incorporates a net use of reserves totalling £1.748m. The principal underlying reasons are detailed below.

## Environmental Services

- 3.5.3 The area is forecasting an overspend of £0.792m (£0.885m at month 8) and after incorporating a transfer to reserves of £0.054m. The main reasons for the adverse variance are detailed below:

- The Waste Management Services is currently expected to overspend by £0.391m due to increasing demands for the service and staff and non-pay pressures
- The Highways Service is expected to overspend by £0.627m (£0.782m overspend as at month 8) relating to the use of agency staff cover and increased material costs. The increase is due to the prudent projection of a Winter Maintenance pressure of approximately £0.200m. Whilst the severity of the winter is obviously unknown historic pressures and the rising cost of materials have informed the projection;
- The Public Protection is expected to underspend by £0.231m (£0.258m underspend as at month 8) principally as a result of vacant posts within the service being recruited and the resulting reduction in agency spend forecasts.
- The Street Lighting Service is expected to underspend by £0.148m compared to £0.086m at month 8, as a result of expected deductions from the PFI contract, it should be noted this is separate to the Street Lighting dimming and trimming budget option;
- The Environmental Management Service is expected to underspend by £0.054m (£0.015m underspend as month 8) with pressures in supplies and services and vehicle costs totalling £0.380m, offset by vacant posts and additional income in the Cemeteries and Crematoria totalling £0.326m; and
- In addition, Building Control is forecasting an overspend of £0.088m with pressures anticipated against income in relation to Building Regulations fees and within Fleet Management, there is a small overspend of £0.001m.

## Economy

- 3.5.4 The area is forecasting an overspend of £4.650 (£4.427m at month 8) after a £1.802m transfer from reserves. The main reasons are detailed below:

- The Estates and Property Management Services are currently expected to overspend by £1.627m (£1.716m overspend as at month 8) due to pressures against the repairs and maintenance (£0.747m), rates (£0.121m), security (£0.200m) and Property Management (£0.559m) budgets. Potential management actions around property works programmed in year could reduce the forecast. The service is currently offsetting some of these pressures through vacant posts and the subsequent salary savings

- The Strategic Housing Service is currently projected to overspend by £2.941m (£2.547m overspend as at month 8) due to continuing demand pressures for Temporary Accommodation totalling £3.132m being offset by use of the homelessness reserve of £0.195m.
- The Planning Service is expected to overspend by £0.174m (£0.095m overspend as at month 8) due to expected under-recovery of Planning Fee income. The total Planning service income budget target for 2023/24 is £0.994m. The income target has been amended to reflect national planning fee increases due to come into place as of December 2023.
- The Facilities Management Service is currently projecting an underspend of £0.069m (£0.013m underspend as at month 8), this due to vacant posts and the subsequent salary savings of £0.448m. This is offset with shortfalls against income targets of £0.166m in addition to an overspend on supplies & services of £0.213m.
- The Town Centre and Markets Service area is currently projecting an underspend of £0.052m as at Month 9. This is due to premises related pressures of £0.048m and shortfalls against income targets totalling £0.067m offset by savings against vacant posts within the service of £0.033m.
- The Creating a Better Place service is expected to be in line with budget after application of £1.390m of reserves. Grant funding opportunities to reduce the reliance on reserves are being investigated by the service; and
- The Business Growth service is currently projecting an overspend of £0.027m). This is largely due to staffing cost pressures of £0.060m and pressures against supplies and services and other non-pay of approximately £0.019m offset by additional income of £0.052m.

#### Achievement of Budget Reductions

- 3.5.5 Budget reductions for the Portfolio in 2023/24 total £2.493m of which £0.672m are rated 'Green – Has / is expected to be fully delivered'. One budget reduction is rated 'Amber – being closely monitored but expected to deliver' with a value of £0.800m. Six Budget Reductions 'with a combined value of £1.021m are now rated 'Red - Will not/ is not expected be delivered in full.

### 3.6 Corporate Services

- 3.6.1 The following table shows the forecast position after the approved and planned use of reserves for the Portfolio at month 9.



**Table 7 – Corporate Services**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Chief Executive, Management and Executive Office	4,919	4,702	0	(217)
Commissioning and Procurement	557	506	0	(52)
Finance	8,188	7,328	0	(860)
Legal Services	3,772	3,901	0	130
Communications and Research	997	1,072	0	75
Customer, Digital and Transformation	7,644	7,069	0	(576)
Strategy and Performance	998	985	0	(13)
HR & Organisational Development	3,243	3,035	0	(209)
<b>Total Forecast Net Expenditure</b>	<b>30,318</b>	<b>28,597</b>	<b>0</b>	<b>(1,721)</b>

### Summary

- 3.6.2 The Portfolio has a projected underspend of £1.721m (£1.310m at month 8). The principal underlying reasons are detailed below.

#### Chief Executive, Management and Executive Office

- 3.6.3 The area is reporting an underspend of £0.217m (£0.175m at month 8), mainly as a result of vacant post and reduced pension costs.

#### Commissioning and Procurement

- 3.6.4 The Division is reporting an underspend of £0.052m (£0.001m underspend reported at month 8). The service is projecting an income pressure of £0.025m against the Early Payment scheme. It continues to experience difficulties in recruiting to permanent posts, this is resulting in the continuation of interims £0.410m which is offset by vacant posts of £0.405m.

#### Finance

- 3.6.5 The Division is reporting an underspend of £0.860m (£0.711m at month 8). The Finance Division has a number of vacant posts, underspends on non-pay budgets and increased income for staff time spent on European grant funded projects.

#### Legal Services

- 3.6.6 The service is reporting an overspend of £0.130m (£0.180m at month 8). There are staffing pressures in Legal due to the use of agency staff £0.376m which is offset in part by vacant posts across the Division £0.203m. There continues to be a pressure in relation to schools buy back income which has been offset by increased income in Registrars and additional grant income received for the Local Election

#### Communications and Research

- 3.6.7 The service is recording an overspend of £0.075m at month 9 compared to a breakeven position at month 8, this relates to expenditure incurred on the Place Marketing project. The position is after reversing a previously anticipated

drawdown of £125k from Placew Marketing and Transformation reserves and transferring £0.200m into reserves.

#### Customer, Digital and Transformation

- 3.6.8 The Division is reporting an underspend of £0.576m (£0.433m at month 8). There are several vacant posts across the Division which is offset in part by agency costs in ICT and Customer Services. There is a pressure of £0.094m on the amount of income receivable from Health and a pressure of £0.231m on third party ICT costs. This has been offset in part from increased fees charged to the capital programme (£0.113m).

#### Strategy & Performance

- 3.6.9 Strategy & Performance is reporting an underspend of (£0.013m) at month 9 which mainly relates to slippage on vacant posts (£0.126m), which is partially offset by cost incurred in relation to the Local Improvement Fund. There is a reserve to cover the costs associated with the Local Improvement Fund (LIF), however, due to an overall service underspend the drawdown of the reserve is not required.

#### Human Resources (HR) and Organisational Development

- 3.6.10 The service is reporting an under spend of £0.209m (underspend of £0.077m at month 8). There are vacant posts totalling (0.810m) which are offsetting an income pressure of £0.331m in relation to schools buy back and funding from Health which has ceased. In addition, there is a pressure of £0.250m

#### Achievement of Budget Reductions

- 3.6.11 Budget reductions for the Portfolio in 2023/24 total £0.870m of which thirteen totaling £0.790m are rated 'Green – Has / is expected to be fully delivered'. One Budget Reduction with a value of £0.080m is rated 'Amber – being closely monitored but expected to deliver'.

### 3.7 Capital, Treasury and Technical Accounting

- 3.7.1 The following table shows the forecast position for the Portfolio at Month 9.

**Table 8 – Capital, Treasury and Technical Accounting**

	Revised Budget £000	Forecast £000	Use of Reserves £000	Variance £000
Capital Treasury and Technical Accounting	24,438	24,364	(1,436)	(1,509)
Corporate and Democratic Core	1,003	1,003	0	0
Parish Precepts	347	347	0	0
<b>Total Forecast Net Expenditure</b>	<b>25,788</b>	<b>25,714</b>	<b>(1,436)</b>	<b>(1,509)</b>

## Summary

### Capital, Treasury and Technical Accounting

- 3.7.2 The Portfolio holds the budgets associated with the Council's Treasury Management activities including interest payable on borrowing and interest receivable on investments and is reporting an underspend of £1.509m which is a virtually unchanged position from that reported at month 8.
- 3.7.3 There are favourable variances of £1.615m due to higher levels of interest receipts on external investments with further favourable variances of £0.107m against cash collections, bank charges and professional fees.
- 3.7.4 The Housing Benefit service is projecting a favourable variance of £0.043m. This is based upon the Department for Work and Pensions Statement of Local Authority claimed Entitlement to Housing Benefit Subsidy Form for the financial year ending March 2024.
- 3.7.5 The Procurement Framework income target is forecast to be £0.256m under by year end. This pressure is offsetting the underspends elsewhere in the portfolio.
- 3.7.6 Additional income of £2.837m has been received from the Greater Manchester Combined Authority (GMCA), this being the Council's share of a £27.000m GM wide waste reserve refund. This has been transferred to Earmarked Reserves to support the future financial resilience of the Council.

### Achievement of Budget Reductions

- 3.7.7 Budget Reductions for the Portfolio in 2023/24 total £11.295m, all of which are rated Green and have been fully delivered.

## **4 Other Grants and Contributions Received by the Council**

- 4.1 The Council has received a number of specific grants from the Government or other organisations which have been ringfenced to Portfolios to be utilised on certain defined activities. At month 9, excluding the DSG as outlined in Section 5.1, Portfolios are forecasting a total of £115.494m of ringfenced grants to be used for specific purposes which have been either new notifications for 2023/24 or grants received in prior years where terms and conditions allow for usage in the current and potentially future years. The table below shows the total grants forecast by Portfolios up to month 9.

**Table 9 – Grants Ringfenced to Portfolios**

<b>Portfolio</b>	<b>Govt. Grants £000</b>	<b>Other Grants £000</b>	<b>Total 2023/24 £000</b>
Community Health and Adult Social Care	-7,021	-15,097	-22,118
Children's Services	-17,897	-12	-17,909
Public Health	-1,138	-104	-1,242
Communities	-2,538	-715	-3,253
Place and Economic Growth	-5,172	0	-5,172
Corporate Services	-5,700	-303	-6,003
Capital, Treasury and Technical Accounting	-40,997	0	-40,997
<b>Total Ringfenced Grants include within the Net Revenue Budget</b>	<b>-80,503</b>	<b>-16,192</b>	<b>-96,695</b>
Housing Revenue Account	-18,799	0	-18,799
<b>Total</b>	<b>-99,302</b>	<b>-16,192</b>	<b>-115,494</b>

- 4.2 As highlighted in the table above, grants (excluding COMF and the DSG) received in previous years and carried forward into 2023/24 and new allocations for 2023/24, total £115.494m; of this sum, £96.695m is within the Net Revenue Budget and £18.799m within the Housing Revenue Account. Dependant on the terms and conditions of the individual grant, some of the above income could be carried forward into 2024/25 to be utilised in future financial years.
- 4.3 Of the £96.695m of General Fund allocations, the largest single category carries a value of £40.977m and relates to Housing Benefit Subsidy Grant which is included within the Capital, Treasury and Technical Accounting Portfolio, comprising £35.455m for Rent Allowances and £5.542m for Rent Rebates. In addition, £15.097m relates to the Better Care Fund Grant which is awarded by NHS England and distributed by Integrated Care Boards which is included within the Community Health and Adult Social Care net revenue budget. A further £13.262m relates to PFI Credits received to support unitary charge payments across the Council's four General Fund PFI schemes. A further two PFI schemes, with grant totalling £18.799m operate within in the Housing Revenue Account. A full list of these grants can be found at Appendix 2.

## **5 Schools**

- 5.1 The Council's expenditure on schools is funded primarily by the Dedicated Schools Grant (DSG) which is provided by the Department for Education. DSG is ring-fenced and can only be applied to meet expenditure properly included in the Schools' Budget, as defined in the School and Early Years Finance (England) Regulations 2022. The Schools' Budget includes elements for a range of educational services provided on an Authority wide basis and for the Individual Schools Budget which is divided into a budget share for each maintained school. The Dedicated Schools Grant settlement for 2023/24 was again updated in November 2023, following which, the total estimated Oldham funding allocation for 2023/24 is £321.956m, £177.151m after excluding the recoupment for academies and post-16 further education (FE) provision and is split across the four funding blocks that comprise the DSG as follows:

- Schools - £240.592m (£110.565m after excluding the recoupment for academies)
- High Needs - £59.146m (£44.368m after excluding the recoupment for academies and Post 16)
- Early Years - £19.757m
- Central Schools Services - £2.461m

5.2 For a number of years there was a considerable financial pressure on the DSG, particularly in the High Needs Block which had been in a deficit position since 2016/17. This was historically due to expenditure exceeding the High Needs budget available each year and is after approved transfers between the Schools and High Needs Blocks of £8.296m between 2016/17 and 2021/22. As shown in the table below, the High Needs Block Deficit, if taken as a stand-alone element without the transfers, was £11.508m at the start of 2023/24. Notwithstanding the emergence of the reducing deficit, there remain operational pressures which the service are working to address, these include:

- Increasing high needs population, such as special school places, resourced provision and post 16 Further Education provision;
- Increasing number of Education Health Care Plans (EHCP) requiring high needs top up funding within mainstream schools;
- Cost of providing local Pupil Referral Unit capacity to ensure that the Local Authority fulfils its statutory role;
- High cost of external placements.

5.3 Incorporating the cumulative support from the Schools Block the High Needs deficit brought forward into 2023/24 is £3.212m. The High Needs Block is currently forecasting an in year surplus of £2.556m, reducing the projected High Needs deficit at the end of 2023/24 to £0.656m, as illustrated in the table below.

**Table 10 – DSG High Needs Block**

<b>DSG High Needs Block</b>	<b>2023/24 £000</b>
Gross Deficit Brought Forward	11,508
Less- Virement from Schools Block- 2016/17 to 2021/22	(8,296)
Deficit Brought Forward 01/04/2023	3,212
2023/24	
Original High Needs Budget Allocation	(59,146)
Estimated Expenditure	56,590
Projected in Year (Surplus)	(2,556)
<b>Projected High Needs Block Deficit 31/03/2024</b>	<b>656</b>

### **Overall DSG Position and Management Plan**

5.4 The DSG had been in a deficit position since 2016/17 and Oldham was supported by the Education and Skills Funding Agency (ESFA) in its monitoring and management of the DSG. As a consequence, the Council has been required to agree a DSG Financial Recovery Plan (now the DSG Management Plan) to demonstrate how, at least a balanced position could be achieved. The plan was first submitted to the Department for Education (DfE) in 2019 since when it has been continuously updated to take account of estimated additional cost pressures, formal

notifications of additional funding and the agreed funding methodology including the transfer of DSG funding between the Schools and the High Needs Funding Blocks that has been undertaken in prior years.

- 5.5 The table below shows the latest DSG Management Plan as at January 2024, which was shared with the Schools Forum at its meeting on 17 January 2024. As previously reported the DSG deficit of £2.773m at the end of 2021/22 had become a surplus of £0.899m at the end of 2022/23. The achievement of a surplus for the first time since 2016/17 represents a major financial milestone for the Council. Taking the opening surplus as the starting point, the in-year forecast surpluses of £2.662m (including anticipated Growth underspend of £0.545m carried forward into 2024/25) and £0.826m in the current and following financial years deliver cumulative surpluses of £3.561m and £4.387m in each of 2023/24 and 2024/25 respectively. A further in year surplus of £0.476m in 2025/26 produces a forecast surplus of £4.863m at 31 March 2026. The sustained and improving position will be further assisted by the work undertaken as part of the DBV programme referred to below.

**Table 11 – Overall DSG Position**

<b>DSG Management Plan 2023/24 to 2025/26</b>	<b>2023/24 £000</b>	<b>2024/25 £000</b>	<b>2025/26 £000</b>
Schools Block (excludes central services)	240,592	255,312	255,312
Central Schools Services Block	2,461	2,352	2,352
High Needs Block – pre/post 16	59,146	61,474	62,570
Early Years Block	15,748	17,771	17,771
Two Year Olds' Funding	3,653	12,198	12,198
Early Years Pupil Premium	226	424	424
Early Years Disability Access Fund	130	216	216
<b>Total Grant</b>	<b>321,956</b>	<b>349,747</b>	<b>350,843</b>
<b>Budget Requirement</b>			
Individual Schools Budgets	241,032	255,857	255,312
Early Year Funding Delegated to Schools	7,108	8,240	8,240
High Needs Funding for Schools (incl Post 16)	45,437	47,578	49,569
Total Delegated to Schools	293,577	311,675	313,121
Central Schools Services	2,461	2,352	2,352
Central Early Years Services	1,047	899	899
Central High Needs Services	11,153	12,525	12,525
Three and Four Year old PVI's	7,765	8,998	8,998
Two Year Old Funding	3,480	11,832	11,832
Total Retained Centrally	25,906	36,606	36,606
Early Years Pupil Premium	226	424	424
Early Years Disability Access Fund	130	216	216
<b>Total Budget Requirement</b>	<b>319,839</b>	<b>348,921</b>	<b>350,367</b>
<b>In Year Surplus</b>	<b>2,117</b>	<b>826</b>	<b>476</b>
Balance brought Forward	899	3,561	4,387
<b>Provisional Surplus</b>	<b>3,016</b>	<b>4,387</b>	<b>4,863</b>
Anticipated Growth underspend committed for 24/25	545	0	0
<b>Projected Surplus / (Deficit)</b>	<b>3,561</b>	<b>4,387</b>	<b>4,863</b>

## **Delivering Better Value (DBV) in SEND**

5.7 Launched in the autumn of 2022, Oldham was selected as one of the Local Authorities invited to take part in Wave 2 of the Delivering Better Value in SEND programme. With the aim of putting Local Authorities on a more sustainable footing so that they are better placed to respond to the forthcoming SEND Review reforms. The Department for Education (DfE) has provided external consultancy advice to enable participants to plan and agree improvements and a change programme. Core funding of £1.000m will be made available to the Authority on successful submission of a grant application, to the DfE. The Authority has participated in a series of workshops and undertaken a comprehensive stakeholder case review and evaluation to identify and develop solutions for the areas of highest need and most likely return/ benefit for inclusion in the grant /application. The application was submitted on 17 July 2023 with a focus on the following areas:

- Early identification and intervention to reduce EHCPS;
- Development of mainstream provision to create an alternative to special schools;
- Updating the resource allocation system;
- Post 16 pathways to ensure better progression;
- Developing and targeting support for;
  - autism
  - speech, language and communication needs
  - social, emotional and mental health

5.8 The grant application was confirmed as having been successful on 15 September 2023, at which point the Council enters into the phase 2 implementation stage. By taking part in this initiative, it is expected that it will assist the Council sustain the DSG financial position and reduce the financial pressure within the High Needs Block.

## **6 Housing Revenue Account (HRA)**

6.1 The current HRA position is presented in Table 13 and compares the initially approved HRA position to the current estimated outturn. The actual closing balance for 2022/23 at £22.584m was £0.305m higher than the final estimate of £22.279m.

6.2 The original HRA forecast for 2023/24 was for a planned in-year decrease in balances of £1.427m arising from:

- The Council choosing not to implement rental increases of up to the maximum allowable of 11.1% for 2023/24. Instead, a much lower increase at just 5% was agreed leading to a call on balances; and
- A budgeted contribution of £1.000m to the capital programme.

6.3 The current forecast is for an in-year surplus against budget of £0.005m, a net adverse movement against HRA balances of £1.422m, attributable to higher than anticipated utility costs. The projected year end HRA balance of £21.162m, represents a net £0.310m favourable movement compared to the original budget.

**Table 12 - Housing Revenue Account Forecast Position**

HRA Income & Expenditure Account	Original Budget £000	Latest 2023/24 Forecast £000	Variance to Budget £000
HRA Balances Brought forward from 2022/23	(22,279)	(22,584)	(305)
(Surplus)/ Deficit on HRA Services for 2023/24	1,427	1,422	(5)
<b>HRA Surplus Balances Carried Forward</b>	<b>(20,852)</b>	<b>(21,162)</b>	<b>(310)</b>

## 7 Collection Fund

7.1 The tables below show the forecast outturn position for the Collection Fund (the technical account within which Council Tax and Business Rates (National Non-Domestic Rates (NDR)) are managed) and the forecast position in relation to the share of balances between the Council and the Greater Manchester Combined Authority precepting Authorities.

**Table 13 - Collection Fund Forecast Position**

Collection Fund Balance	Council Tax £000	NDR £000	Total £000
Balance Brought Forward	410	(4,127)	(3,717)
Release of estimated surplus carried forward from 2022/23	(48)	(4,131)	(4,179)
<b>Prior Year Balance Brought Forward</b>	<b>458</b>	<b>4</b>	<b>462</b>
(Surplus) /Deficit for the Year	(126)	(1,043)	(1,169)
<b>Net (Surplus)/Deficit Carried Forward</b>	<b>332</b>	<b>(1,039)</b>	<b>(707)</b>

**Table 14 - Collection Fund – 2023/24 Share of Balances; Forecast Position**

Collection Fund Balance	Council Tax £000	NDR £000	Total £000
Share - Oldham Council	279	(1,019)	(750)
Share – Greater Manchester Combined Authority - Mayoral Police and Crime Commissioner	37	-	37
Share – Greater Manchester Combined Authority - Mayoral General Precept (including Fire and Rescue Services)	16	(10)	6
<b>Total Deficit/(Surplus)</b>	<b>332</b>	<b>(1,039)</b>	<b>(707)</b>

7.2 Council Tax and Business Rates are a significant source of funding for Council services. However, income from these areas can be volatile. The 2023/24 financial year is no different with the on-going cost of living crisis impacting on Council Tax collection. As such, the financial position of the Collection Fund is under constant review.

7.3 The Business Rates surplus brought forward from 2022/23 was due in part to collection rates returning to pre-pandemic levels and as can be seen, this healthy position continues into 2023/24.



- 7.4 The Greater Manchester 100% Business Rates Retention Pilot has continued into 2023/24. Any financial benefits arising from membership within the pilot scheme will continue to be monitored, any beneficial financial resource will be used if possible, to support the Council's budget.
- 7.5 As advised previously, the Collection Fund is a particularly volatile area to forecast with many variables, including the impact of Government Business Rate reliefs, therefore, this area will be closely monitored over the remaining months. Information will be available later in the year to determine if/ how a surplus or deficit on the Collection Fund will impact on the 2024/25 Council budget.

## **8 Use of Reserves**

- 8.1 Members will recall that at the Council budget meeting of 1 March 2023, it was agreed that Earmarked Reserves of £12.786m would be used to support the 2023/24 revenue budget and a further £3.932m of Earmarked Reserves were proposed to be utilised to support the 2024/25 revenue budget. The Earmarked Reserves to be utilised in 2023/24 and 2024/25 were to be met by fully utilising the specific Balancing Budget reserve of £16.718m.
- 8.2 In addition, there is an offsetting transfer to reserves of £1.209m reflecting the requirement, under the Business Rates Retention Pilot scheme, to pay the Greater Manchester Combined Authority a share of Retained Business Rates income.
- 8.3 As previously mentioned at paragraph 3.7.6, the Council has received £2.837m this year from GMCA, being the share of a £27.000m GM wide refund of reserves from the GM Waste Disposal Service. This unbudgeted income has been transferred to Earmarked Reserves to support the financial resilience of the Council.
- 8.4 At the beginning of 2023/24, reserves balances totalled £87.099m comprising of Earmarked Reserves of £79.130m and Revenue Grant Reserves of £7.968m.
- 8.5 Table 15 below sets out the forecast use of reserves for the full financial year based on a best estimate of the likely commitments including a number of reserves that are being used to support the overall financial position. In addition to the net £11.577m required to balance the budget at the start of the year an additional £10.848m of Earmarked Reserves are expected to be called in to support Directorate budgets together with £3.680m of Revenue Grant Reserves; a total of £14.527m. After transfers to reserves of £0.054m and £2.837m, this nets down to a further £11.638m use of reserves. This will leave a total balance of reserves of £63.884m carrying forward into 2024/25 comprising £59.596m of Ear-marked reserves and £4.288m of Revenue Grant Reserves.

**Table 15 – Reserves Summary**

Use of Reserves Month 9	Earmarked Reserves £000	Revenue Grant Reserves £000	Total Reserves £000
<b>Opening Balance as at 1 April 2023</b>	<b>(79,130)</b>	<b>(7,968)</b>	<b>(87,099)</b>
Reserves applied to balance the Budget	12,786	-	12,786
Transfer to Earmarked Reserves - Business Rates Retention Pilot Gain	(1,209)	-	(1,209)
<b>In Year Balance</b>	<b>(67,553)</b>	<b>(7,968)</b>	<b>(75,522)</b>
<b>Directorate Transfers from Reserve</b>			
Community Health and Adult Social Care	2,924	-	2,924
Children's Services	999	2,243	3,242
Public Health	796	1,137	1,933
Communities	55	300	355
Place and Economic Growth	1,801	-	1,801
Corporate Services	-	-	-
Capital Treasury and Technical Accounting	4,273	-	4,273
<b>Total Directorate Transfers from Reserve</b>	<b>10,848</b>	<b>3,680</b>	<b>14,527</b>
<b>Directorate Transfers to Reserves</b>			
Community Health and Adult Social Care	-	-	-
Children's Services	-	-	-
Public Health	-	-	-
Communities	-	-	-
Place and Economic Growth	(54)	-	(54)
Corporate Services	-	-	-
Capital Treasury and Technical Accounting	-	-	-
<b>Total Directorate Transfers to Reserve</b>	<b>(54)</b>	<b>-</b>	<b>(54)</b>
<b>Directorate Use of Reserves</b>	<b>10,794</b>	<b>3,680</b>	<b>14,474</b>
Return of Waste Reserve (GMCA)	(2,837)	-	(2,837)
<b>Total Proposed In Year Use of Reserves</b>	<b>7,957</b>	<b>3,680</b>	<b>11,638</b>
<b>Closing Balance as at Month 9</b>	<b>(59,596)</b>	<b>(4,288)</b>	<b>(63,884)</b>

- 8.6 In line with the Council's reserves policy, the recommended use of reserves to fund spend during the year have been initially approved by the appropriate officers prior to consideration by Cabinet. However, as there is a need to minimise the use of reserves in order to support the financial resilience of the Council, only those reserves supporting essential business will be utilised this year.
- 8.7 The availability of reserves is a demonstration of the financial resilience of the Council and as such the reserves must be carefully managed. However, the use of reserves is also a means by which the Council can support the 2023/24 and future years budget setting processes and Medium-Term Financial Strategy. In addition to use in the current financial year, as part of the 2023/24 Budget setting process agreed by Council on 1 March 2023, Members approved a commitment of a further £3.932m of reserves for 2024/25. At the Budget Council meeting on 28 February 2024, Council approved the use of reserves totalling £10,753m in setting the 2024/25 budget. It must also be noted that the current forecast revenue overspend, for 2023/24 of £16.642m will be required to be financed from the use

of earmarked reserves as part of the year end process. The continued reduction in the level of available reserves, will, reduce the financial resilience of the Council.

## **9 Flexible Use of Capital Receipts**

- 9.1 Members will recall that at the Council meeting of 1 March 2023, it was approved that up to £2.600m of capital receipts would be used to underpin the revenue budget in line with the flexibilities agreed by Secretary of State for Housing, Communities and Local Government in March 2016. In April 2022, guidance on the flexible use of capital receipts was updated by the Department for Levelling Up, Housing and Communities which extended the flexibility that has been in place since 2016. This allows the freedom to continue up to 2024/25 to help Authorities plan for the long-term.
- 9.2 A number of schemes in support of the transformation programme which meet the qualifying expenditure requirements as detailed within the statutory guidance issued by the DLUHC have been identified and are itemised within the approved 2023/24 Capital Programme. The contribution to the Flexible Use of Capital Receipts is the first call on any receipts generated by the Council and processes are in place to monitor progress throughout the year. Annex 2 to this report which sets out the Capital Programme position confirms that receipts totalling £5.086m have been received to date, exceeding the £2.600m required to underpin the revenue budget.

## **10 Conclusion**

- 10.1 The lasting impact of the COVID-19 pandemic is evident from the pressures being experienced by Children's Social Care Services and to a lesser degree by Adult Social Care Services (from a purely Council financial perspective). In addition, the potential impact on pay awards and also interest rates continue to be reviewed. The forecasting of the likely impact of all these factors on the Council's budget has been based on both the actual expenditure and the income impact recorded but also relies on a series of assumptions which has been reviewed and updated as the financial year has progressed.
- 10.2 The current projected position, after adjustment for the use of reserves is an overspend of £16.642m. The financial pressure in Children's Social Care is especially concerning as there was £14.700m of additional funding included in the 2023/24 budget, £11.800m of which was intended to stabilise the budget with £2.900m to support a programme of change and transformation with the aim of delivering efficiency savings in future years.
- 10.3 It is of concern that the overall financial position has continually worsened as the year has progressed. Along with service demand pressures that can be seen in the Children's Service and Strategic Housing especially, the pressure caused by failure to deliver Budget Reductions remains challenging. Given the budget reductions already approved from previous years and the new 2024/25 budget reductions recently approved, it must be noted that if these Budget Reductions are not achieved then the Council could have a challenging 2024/25 which will ultimately impact the financial resilience of the Council.
- 10.4 The reserves position is important in the context of financial resilience. Although reduced from 2022/23 levels, the year started with relatively healthy levels of

earmarked reserves (£79.130m) and Revenue Grant Reserves (£7,968m). However, the budget for 2023/24 relied upon the use of reserves to produce a balanced position; a net £11.577m was used comprising £12.786m of reserves to balance the budget netted off by a £1.209m transfer to reserves. Therefore, on 1/4/23 earmarked reserves reduced from £79.130m to £67.553m (£12.786m of reserves being used to balance the budget netted off by a £1.209m transfer to reserves).

10.5 As advised in this report, net earmarked reserves of £7.957m and net Revenue Grant reserves of £3.680m are forecast to be called into support the 2023/24 budget, after which there is an anticipated combined reserves balance of £63.884m. With a potential additional call of £16.642m to offset the current forecast deficit and an already approved use of £3.932m of reserves to balance the 2024/25 budget and futures years, the actual availability in 2024/25 could reduce to £43.310m. The additional reserves of £10.753m was approved at the Budget Council on 28 February 2024 as part of the 2024/25 budget setting process will further reduce the level of useable reserves. At this potential level of utilisation, it is vitally important to minimise the future use of reserves in year to maintain financial resilience of the Council.

10.6 In view of the projected adverse variance, it is important to ensure that the approved measures taken to address the overspending, namely:

- management actions across all service areas to review and challenge planned expenditure and to maximise income;
- processes to monitor the recruitment of staff to vacant posts and significant items of expenditure; and
- ensuring non-essential expenditure is minimised.

Are fully adhered, to help mitigate and reduced the current forecast overspend during 2023/24. In effect this is a continuation of actions that were initiated last year (and previous years), however, the variance at month 9 continues to increase and is much more significant than at any point in 2022/23. It is therefore essential that this approach is rigorously applied and where possible, any transformation programme projects linked to savings are accelerated. The effectiveness of management action and corporate procedures will be closely monitored by Management Teams right up to the end of the financial year.

FINANCING OF THE 2023/24 BUDGET	Original Budget	Additions to Month 7	Additions Month 8	Additions Month 9	Revised Budget
	£000	£000	£000		£000
<b>Net Expenditure Budget</b>	<b>(260,686)</b>				<b>(260,686)</b>
<b>Financed by:</b>					
Business Rates Top-up Grant	(46,016)	(577)			(46,593)
Grant in Lieu of Business Rates	(25,987)				(25,987)
Social Care Support Grant	(21,454)				(21,454)
Improved Better Care Fund Grant	(11,188)				(11,188)
2022/23 Services Grant	(2,620)				(2,620)
Housing Benefit Administration Grant	(810)				(810)
New Homes Bonus Grant	(252)				(252)
Revenue and Benefits Service New Burdens Grant	(11)				(11)
Capital Grants		(3,707)	(2,492)	(2,000)	(8,199)
Family Hubs and Start for Life Programme Grant		(1,444)			(1,444)
Rough Sleeping Drug & Alcohol Treatment Grant		(708)			(708)
Supplementary Substance Misuse Treatment and Recovery Funding Grant		(497)			(497)
Individual Placement and Support Grant		(156)			(156)
Leaving Care Allowance Grant		(61)			(61)
Capacity and Capability Grant		(70)			(70)
Levelling Up Partnership (LUP) Local Authority Capacity Payment Grant		(45)			(45)
Extended Rights to Free Travel Grant		(45)			(45)
TBC					-
<b>Total Government Grant Funding</b>	<b>(108,338)</b>	<b>(7,310)</b>	<b>(2,492)</b>	<b>(2,000)</b>	<b>(120,140)</b>
Council Tax Income - General (Including parish precepts)	(94,449)				(94,449)
Council Tax Income - Adult Social Care Precept	(14,874)				(14,874)
Council Tax Surplus	(4,130)				(4,130)
Retained Business Rates	(53,683)				(53,683)
<b>Total Locally Generated Income</b>	<b>(167,136)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(167,136)</b>
<b>Total Grant and Income</b>	<b>(275,474)</b>	<b>(7,310)</b>	<b>(2,492)</b>	<b>(2,000)</b>	<b>(287,274)</b>
Use of General Earmarked Reserves	(12,786)				(12,786)
Transfer to Earmarked Reserves - Business Rates Retention Pilot Gain	1,209				1,209
<b>Total Use of Reserves</b>	<b>(11,577)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(11,577)</b>
<b>Total Financing</b>	<b>(287,051)</b>	<b>(7,310)</b>	<b>(2,492)</b>	<b>(2,000)</b>	<b>(298,851)</b>

<b>Appendix 2- Analysis of Grants</b>		
<b>Grant Name</b>	<b>Type</b>	<b>Forecast £000</b>
<b>Community Health and Adult Social Care</b>		
Better Care Fund	Other	(15,097)
Market Sustainability and Fair Cost of Care Fund	Govt.	(2,628)
Market Sustainability & Improvement Fund	Govt.	(1,707)
Adult Social Care Discharge Fund	Govt.	(1,568)
Urgent & Emergency Care Support Fund	Govt.	(527)
Changing Futures in GM	Govt.	(370)
Individual Placement and Support Grant	Govt.	(156)
Balance: Grants less than £0.150m	Govt. x3	(66)
<b>Sub Total</b>		<b>(22,118)</b>
<b>Children's Services</b>		
PFI Credits	Govt. x2	(8,988)
Skills Funding Agency Adult Education	Govt.	(3,085)
Holiday Activities and Food Grant	Govt.	(1,480)
Support to victims of Domestic Abuse within Safe Accommodation	Govt.	(592)
Unaccompanied Asylum-Seeking Children (UASC)	Govt.	(536)
Youth Justice Board	Govt.	(496)
Former UASC - Care Leavers	Govt.	(287)
Staying Put Grant	Govt.	(201)
DJUHD - Domestic Abuse	Govt.	(170)
Family Hubs and Start for Life Programme Grant	Govt.	(1,444)
Balance: Grants less than £0.150m	Govt.(x8) Other (x1)	(630)
<b>Sub Total</b>		<b>(17,909)</b>
<b>Public Health</b>		
Public Health Grant	Govt.	(577)
Supplementary Substance Misuse Treatment and Recovery Funding Grant	Govt.	(497)
Grants less than £0.150m	Govt.(x1) Other (x1)	(168)
		<b>(1,242)</b>
<b>Communities</b>		
PFI Credits	Govt.	(1,803)
Community Safety	Govt.	(715)
Home Office Full Dispersal Grant	Govt.	(683)
Balance: Grants less than £0.150m	Govt.(x2)	(52)
<b>Sub Total</b>		<b>(3,253)</b>
<b>PEG</b>		
PFI Credits	Govt.	(2,471)
Homelessness Prevention Grant	Govt.	(746)
A Bed Every Night (ABEN)	Govt.	(293)
CAS-3 Grant	Govt.	(247)
Rough Sleeping Initiative	Govt.	(150)
Rough Sleeping Drug & Alcohol Treatment Grant	Govt.	(708)
Balance: Grants less than £0.150m	Govt.(x8)	(557)
<b>Sub Total</b>		<b>(5,173)</b>
<b>Corporate Services</b>		
Housing Support Fund	Govt.	(4,839)
Council Tax Rebate	Govt.	(599)
Erdf	Other	(303)
Balance: Grants less than £0.150m	Govt.(x5) Other (x1)	(263)
<b>Sub Total</b>		<b>(6,003)</b>
<b>Capital and Treasury</b>		
Rent Allowances	Govt.	(35,455)
Housing Benefit Subsidy	Govt.	(5,542)
<b>Sub Total</b>		<b>(40,997)</b>
<b>Total Ring-fenced Grants Included within the Net Revenue Budget</b>		<b>(96,694)</b>
<b>Housing Revenue Account</b>		
PFI Credits	Govt.(x2)	(18,799)
<b>Total</b>		<b>(115,493)</b>

## CAPITAL INVESTMENT PROGRAMME REPORT 2023/24

### Month 9 – December 2023

#### 1 Background

- 1.1 The original capital programme for 2023/24 reflected the priorities outlined in the capital strategy as approved at Cabinet on 13 February 2023 and confirmed at the Council meeting on 1 March 2023.
- 1.2 The position as at 31 December 2023 (updated for more recent information where possible) is highlighted in this report. It is anticipated that this report will, as far as possible, reflect the outturn position.
- 1.3 Although this report is presented close to the year-end, the programme will continue to be monitored and revised to take account of any new developments and changes in the profile of planned expenditure.

#### 2 Current Position

- 2.1 The approved capital programme summary position for the five financial years 2023/24 to 2027/28, approved by Council on 1 March 2023 is summarised in Table 1 and shows capital programme expenditure of £110.305m in 2023/24.

**Table 1 : Original Budget - Capital Programme 2023/24 to 2027/28**

2023/24 £000	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	TOTAL £000
110,305	108,378	46,661	55,562	4,554	325,460

- 2.2 Table 2 shows the revised capital programme for 2023/24 as at 31 December 2023. It therefore shows an overall expenditure level of £79.466m, following a number of changes explained in the following paragraphs.
- 2.3 The actual expenditure position is £52.765m (66.40% of forecast outturn). This spending profile is higher than in previous years. The position will be kept under review and budgets will be managed in accordance with forecasts.

**Table 2 – 2023/24 Capital Programme**

Directorate	Revised Budget (M08) £000	Approved Virements (M09) £000	Proposed Virement/ Rephase £000	Revised Budget (M09) £000	Forecast £000	Variance £000
Community Health and Adult Social Care	5,302	-	-	5,302	5,302	-
Children's Services	4,281	-	-	4,281	4,281	-
Communities	186	-	-	186	186	-
Place and Economic Growth	61,607	-	-	61,607	61,607	-
Housing Revenue Account (HRA)	764	-	-	764	764	-
Corporate/ Information Technology (IT)	3,893	-	833	4,726	4,726	-
Capital, Treasury & Technical Accounting	2,600	-	-	2,600	2,600	-
Funding for Emerging Priorities	-	-	-	-	-	-
<b>Overall Total</b>	<b>78,633</b>	<b>-</b>	<b>833</b>	<b>79,466</b>	<b>79,466</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

2.4 The were no approved virement in Month 9 (December 2023).

### Re-profiling of the Capital Programme

2.5 The Council meeting of 1 March 2023 approved the 2023/24 to 2027/28 Capital Strategy and Programme, since which time the capital programme has been extended for a further financial year to 2028/29. Taking into account the above amendments and the recently approved 2024/25 to 2028/29 Capital Strategy and Programme, the updated position is shown in Table 3 together with the projected financing profile.

2.6 The overall increase in the 2023/24 – 2028/29 capital programme is a net overall increase of £0.531m, detailed below:

	2023/24 £000	2024/25 £000	Total £000
Third Party Contribution to IT Scheme	56	-	56
Assumed 2024/25 School Condition Allocation Grant	-	200	200
Assumed 2024/25 Devolved Formula Capital Grant	-	275	275
<b>Total</b>	<b>56</b>	<b>475</b>	<b>531</b>



**Table 3 – 2023/24 - 2028/29 Capital Programme**

Directorate Budget	Revised 2023/24 £000	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	Total £000
Community Health and Adult Social Care	5,301	4,443	1,000				<b>10,744</b>
Children's Services	4,282	4,724	5,058	3,188	2,000		<b>19,252</b>
Communities	186	100	174				<b>460</b>
Place and Economic Growth	61,607	83,226	68,622	26,601	17,859	1,000	<b>258,915</b>
Housing Revenue Account	764	628	95				<b>1,487</b>
Corporate/ Information Technology	4,726	2,919	2,809	2,039	3,661	1,000	<b>17,154</b>
Capital, Treasury & Technical Accounting	2,600	2,600	-	126	10,120	-	<b>15,446</b>
Funding for Emerging Priorities	-	1,043	3,318	2,884	2,000	-	<b>9,245</b>
<b>Overall Total</b>	<b>79,466</b>	<b>99,683</b>	<b>81,076</b>	<b>34,838</b>	<b>35,640</b>	<b>2,000</b>	<b>332,703</b>

(subject to rounding – tolerance +/- £1k)

Funding	2023/24 £000	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	Total £000
Grants and Other Contributions	(29,069)	(43,835)	(28,633)	(6,494)	(4,054)	-	<b>(112,085)</b>
Prudential Borrowing	(41,477)	(49,637)	(51,646)	(27,852)	(31,494)	(2,000)	<b>(204,106)</b>
Revenue Contribution	(1,079)	(630)	(95)	-			<b>(1,804)</b>
Capital Receipts	(7,841)	(5,581)	(702)	(492)	(92)		<b>(14,708)</b>
<b>Overall Total</b>	<b>(79,466)</b>	<b>(99,683)</b>	<b>(81,076)</b>	<b>(34,838)</b>	<b>(35,640)</b>	<b>(2,000)</b>	<b>(332,703)</b>

(subject to rounding – tolerance +/- £1k)

2.7 The revised Funding for Emerging Priorities allocation for 2023/24 to 2028/29, shows the resources available to support new projects from Council resources over the life of the capital programme.

### Capital Receipts

2.8 The revised capital programme requires the availability of £7.841m of capital receipts in 2023/24 for financing purposes. The total net usable capital receipts currently received in year is £5.593m. This ensures that there is no shortfall in the support for the revenue budget as the first £2.600m of capital receipts have been earmarked to be used to provide funding under the flexible use of capital receipts initiative.

2.9 The current capital receipts position is as follows:

**Table 4 – Capital Receipts 2023/24**

	£000	£000
Capital Receipts Financing Requirement		7,841
Usable Capital Receipt b/fwd.	-	
Actual received to date	(5,593)	
<b>Further Required in 2023/24</b>		<b>2,248</b>

- 2.10 Given the significant amounts of receipts needed to finance the capital programme in this and future years it is imperative that the capital receipts/disposal schedule is adhered to. This is monitored at the monthly Capital Receipts meeting and will be subject to on-going review for the remainder of the year and beyond. It is of course recognised that the lasting effects of the pandemic has had an impact of business/economic activities making capital disposals more challenging.
- 2.11 The Capital Strategy and Capital Programme 2023/24 to 2027/28 now updated to take account of the Capital Strategy and Capital Programme 2024/25 to 2028/29 includes the level of receipts that is anticipated in each of the respective years and therefore an estimate as to the resultant level of over or under programming in order to present a balanced programme. The revised and updated position is illustrated in the table below:

**Table 5 – Capital Receipts 2023/24 - 2028/29**

<b>Capital Receipts</b>	<b>2023/24 £000</b>	<b>2024/25 £000</b>	<b>2025/26 £000</b>	<b>2026/27 £000</b>	<b>2027/28 £000</b>	<b>2028/29 £000</b>
Capital Receipts Carried Forward	-	(1,355)	716	(5,122)	(6,207)	(8,365)
Estimated Capital Receipts	(3,603)	(3,510)	(6,540)	(1,577)	(2,250)	-
Received in year	(5,593)					
<b>Total Receipts</b>	<b>(9,196)</b>	<b>(4,865)</b>	<b>(5,824)</b>	<b>(6,699)</b>	<b>(8,457)</b>	<b>(8,365)</b>
Capital Receipts Financing Requirement	7,841	5,581	702	492	92	-
<b>Over/(Under) programming</b>	<b>(1,355)</b>	<b>716</b>	<b>(5,122)</b>	<b>(6,207)</b>	<b>(8,365)</b>	<b>(8,365)</b>

(subject to rounding – tolerance +/- £1k)

- 2.12 There is a projected surplus in the capital receipts required to finance the capital programme in the current year 2023/24, however this is offset with a forecast shortfall for 2024/25. The remainder of the Capital Programme is currently projecting a surplus position, but this will depend on the movement of expenditure over the life of the programme. Officers will therefore look to accelerate the disposal of some assets to minimise the potential shortfall during 2024/25. This position will be kept under review given the opportunity for the projections to change up to 2028/29 and a prudent approach has been taken with regard to the use of capital receipts in the latter years of the capital programme.

### 3 Conclusion

- 3.1 The capital programme has seen considerable reprofiling in year. Whilst the current estimated forecast outturn position is £79.466m, it is possible that as the year draws to an end, further re-profiling may still be required. This will be addressed as part of the year end process.

## 4 **Appendices**

- 4.1 Appendix A - SUMMARY – Month 9 - Community Health and Adult Social Care
- Appendix B - SUMMARY – Month 9 - Children’s Service
- Appendix C - SUMMARY – Month 9 - Communities
- Appendix D - SUMMARY – Month 9 - Place and Economic Growth
- Appendix E - SUMMARY – Month 9 - Housing Revenue Account (HRA)
- Appendix F - SUMMARY – Month 9 - Corporate/Information Technology
- Appendix G - SUMMARY – Month 9 - Capital Treasury and Technical Accounting
- Appendix H - SUMMARY – Month 9 - Funding for Emerging Priorities
- Appendix I - SUMMARY – Month 9 - Proposed Changes

**SUMMARY – Month 9 (December 2023) - Community Health and Adult Social Care****APPENDIX A**

Service area	Revised Budget (M08) £000	Approved Changes /Virements (to M09) £000	Proposed Virement (M09) £000	Revised Budget (M09) £000	Forecast £000	Year End Variance £000
Adult Services	5,302	-	-	5,302	5,302	-
<b>Community Health and Adult Social Care Total</b>	<b>5,302</b>	<b>-</b>	<b>-</b>	<b>5,302</b>	<b>5,302</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

**SUMMARY – Month 9 (December 2023) – Children’s Service****APPENDIX B**

Service area	Revised Budget (M08) £000	Approved Changes /Virements (to M09) £000	Proposed Virement (M09) £000	Revised Budget (M09) £000	Forecast £000	Year End Variance £000
Children, Young People and Families (CYPF)	361			361	361	-
Schools - General Provision	12			12	12	-
Schools – Primary	1,578			1,578	1,578	-
Schools – Secondary	2,165			2,165	2,165	-
Schools – Special	15			15	15	-
Schools New Build	150			150	150	-
<b>Children’s Service Total</b>	<b>4,281</b>	<b>-</b>	<b>-</b>	<b>4,281</b>	<b>4,281</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

**SUMMARY – Month 9 (December 2023) – Communities**

**APPENDIX C**

<b>Service area</b>	<b>Revised Budget (M08) £000</b>	<b>Approved Changes /Virements (to M09) £000</b>	<b>Proposed Virement (M09) £000</b>	<b>Revised Budget (M09) £000</b>	<b>Forecast £000</b>	<b>Year End Variance £000</b>
Local Investment Fund	186	-	-	186	186	-
<b>Communities Total</b>	<b>186</b>	<b>-</b>	<b>-</b>	<b>186</b>	<b>186</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

**SUMMARY – Month 9 (December 2023) – Place and Economic Growth**

**APPENDIX D**

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<b>Service area</b>	<b>Revised Budget (M08) £000</b>	<b>Approved Changes /Virements (to M09) £000</b>	<b>Proposed Virement (M09) £000</b>	<b>Revised Budget (M09) £000</b>	<b>Forecast £000</b>	<b>Year End Variance £000</b>
Asset Management - Asset Management	4,284	-	-	4,284	4,284	-
Asset Management - Education Premises	1,156	-	-	1,156	1,156	-
Boroughwide Developments	14,515	-	-	14,515	14,515	-
Boroughwide Projects	10	-	-	10	10	-
Cemeteries and Crematorium	46	-	-	46	46	-
Countryside	100	-	-	100	100	-
Parks	576	-	-	576	576	-
Playing Fields & Facilities	1,002	-	-	1,002	1,002	-
Parks & Playing Fields	13	-	-	13	13	-
Private Housing – HMRF	124	-	-	124	124	-
Private Housing - Non-HMRF	435	-	-	435	435	-
Strategic Acquisitions	522	-	-	522	522	-
Town Centre Developments	23,263	-	-	23,263	23,263	-
Accident Reduction	1,100	-	-	1,100	1,100	-
Bridges & Structures	5,198	-	-	5,199	5,198	-
Fleet Management	749	-	-	749	749	-
Highway Major Works/Drainage schemes	6,259	-	-	6,258	6,259	-
Minor Works	1,204	-	-	1,204	1,204	-
Miscellaneous	1,051	-	-	1,051	1,051	-
<b>Place and Economic Growth Total</b>	<b>61,607</b>	<b>-</b>	<b>-</b>	<b>61,607</b>	<b>61,607</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

**SUMMARY – Month 9 (December 2023) - Housing Revenue Account (HRA)****APPENDIX E**

<b>Service area</b>	<b>Revised Budget (M08) £000</b>	<b>Approved Changes /Virements (to M09) £000</b>	<b>Proposed Virement (M09) £000</b>	<b>Revised Budget (M09) £000</b>	<b>Forecast £000</b>	<b>Year End Variance £000</b>
Housing Revenue Account	764	-	-	764	764	-
<b>HRA Total</b>	<b>764</b>	<b>-</b>	<b>-</b>	<b>764</b>	<b>764</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

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**SUMMARY – Month 9 (December 2023) – Corporate/Information Technology (IT)****APPENDIX F**

<b>Service area</b>	<b>Revised Budget (M08) £000</b>	<b>Approved Changes /Virements (to M09) £000</b>	<b>Proposed Virement (M09) £000</b>	<b>Revised Budget (M09) £000</b>	<b>Forecast £000</b>	<b>Year End Variance £000</b>
Information Technology	3,893	-	833	4,726	4,726	-
<b>Information Technology Total</b>	<b>3,893</b>	<b>-</b>	<b>833</b>	<b>4,726</b>	<b>4,726</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

<b>EXPENDITURE BUDGETS TO BE REPROFILED AS AT 31 DECEMBER 2023</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>	<b>Comments</b>
<b>Directorate / Scheme</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>	
<b>Corporate / Information Technology</b>					
Technology Roadmap Digital and Technology Foundations	715	-	-	-	Budget Realignment / Rephase
Application Portfolio Management Line of Business Systems	(2)	6	120	-	New Funding / Budget Realignment / Rephase
Digital Leadership Business Support HR/OD Foundations	(50)	(100)	(150)	50	Budget Realignment / Rephase
Digital Workforce Workforce Collaboration and Productivity	120	-	(70)	-	Budget Realignment / Rephase
Digital Services Customer Experience	49	(200)	200	-	Budget Realignment / Rephase
Digital Communities Business Insight Performance, Strategy & Policy Foundations	1	-	-	-	Budget Realignment
IT General Provision	-	-	(851)	(111)	Budget Realignment / Rephase
CCTV System Upgrade - Sir Robert Peacock House	-	328	-	-	Budget Realignment
<b>Corporate / Information Technology TOTAL</b>	<b>833</b>	<b>34</b>	<b>(751)</b>	<b>(61)</b>	
<b>Place and Economic Growth</b>					
Vehicle Activated signs - Instillation and enhancement programme	-	50	-	-	Budget Realignment
A669 Oldham Road, Grasscroft Pedestrian Safety Improvements	-	(50)	-	-	Budget Realignment
<b>Place and Economic Growth TOTAL</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>TOTAL</b>	<b>833</b>	<b>34</b>	<b>(751)</b>	<b>(61)</b>	



**SUMMARY – Month 9 (December 2023) – Capital Treasury and Technical Accounting**

**APPENDIX G**

Service area	Revised Budget (M08) £000	Approved Changes /Virements (to M09) £000	Proposed Virement (M09) £000	Revised Budget (M09) £000	Forecast £000	Year End Variance £000
Cross Cutting /Corporate	2,600	-	-	2,600	2,600	-
<b>Capital Treasury and Technical Accounting Total</b>	<b>2,600</b>	<b>-</b>	<b>-</b>	<b>2,600</b>	<b>2,600</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

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**SUMMARY – Month 9 (December 2023) - Funding for Emerging Priorities**

**APPENDIX H**

Service area	Revised Budget (M08) £000	Approved Changes /Virements (to M09) £000	Proposed Virement (M09) £000	Revised Budget (M09) £000	Forecast £000	Year End Variance £000
Funding for Emerging Priorities	-	-	-	-	-	-
<b>Funding for Emerging Priorities Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

(subject to rounding – tolerance +/- £1k)

**Major Variances Commentary**

No additional variances to report

## SUMMARY – Month 9 (December 2023) Proposed Changes



### APPENDIX I

subject to rounding – tolerance +/- £1k)

<b>FINANCING BUDGETS TO BE REPROFILED AS AT 31 DECEMBER 2023</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>
<b>Fund Source</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>
Grants and Contributions	-	(56)	-	-
Prudential Borrowing	(833)	22	751	61
Revenue Contributions	-	-	-	-
Capital Receipts	-	-	-	-
<b>TOTAL</b>	<b>(833)</b>	<b>(34)</b>	<b>751</b>	<b>61</b>

(subject to rounding – tolerance +/- £1k)

## GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD

### WORK PROGRAMME 2023/24

Thursday 22 June 2023	Performance Report Quarter 4 – 2022/23	To scrutinise the Council's performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting
	Absence Trends Across the Authority	To scrutinise sickness levels and undelying issues, across the Council	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting
Thursday 5 October 2023	Performance Report – Quarter 1, 2023/24	To scrutinise the Council's performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting
	Local Government Ombudsman – Annual Report	To scrutinise the Council's position regarding complaints and complaints pursued through to the Ombudsman.	Portfolio – Finance and Low Carbon. Anne Ryans, Director of Finance/Paul Entwistle, Director of Legal Services	Consideration of Annual Report
	Treasury Management Quarter One Report 2023/24	Review of treasury management performance in 2023/24 (Quarter 1: April – June 2023)	Portfolio – Finance and Corporate Services  Anne Ryans, Director of Finance.	Budget performance reporting
	Treasury Management 2022-23 Review	Review of performance in 2022/23	Portfolio – Finance and Corporate Services	Budget performance reporting

			Anne Ryans, Director of Finance.	
	Revenue Monitor and Capital Investment Programme 2023/24 Quarter 1	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Low Carbon. Anne Ryans, Director of Finance.	Budget performance reporting
Thursday 22 November 2023				
Thursday, 14 <sup>th</sup> December 2023	Performance report – Quarter 2, 2023/24	To scrutinise Council performance against agreed performance measures.	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting
	Miocare Group – Annual report	To scrutinise the performance of the MioCare Group	Portfolio – Health and Social Care Deputy Chief Executive.  Rob Jackson, Managing Director, MioCare Group	Annual Report consideration/service performance reporting
	Revenue Monitor and Capital Investment Programme 2023/24 Quarter 2	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Corporate Resources Sarah Johnston, Director of Finance.	Budget performance reporting
	Partnership Risk Dashboard	To assess the overall risk on partnerships to the Council.	Portfolio – Finance and Corporate Resources. Sarah Johnston, Director of Finance.	Budget performance reporting

Thursday 25 January 2024 (Administration Budget)	Revenue, Monitor and Capital Investment Programme	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.	
	Revenue Budget report 2024/25 and Medium Term Financial Strategy	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.	
	Capital Strategy and Capital Programme	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.	
	Treasury Management Strategy 2024/25	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.	
	Housing Revenue Account	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.	
Thursday 8 February 2024	Opposition Budget	Liberal Democrat Group's Budgetary proposals 2024/25		
		Conservative Group's Budgetary proposals 2024/25		
	Performance report Quarter 3, 2023/24	To scrutinise Council performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting.

Thursday, 21 <sup>st</sup> March 2024				
	Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Corporate Resources Sarah Johnston, Director of Finance.	Budget performance reporting
	Poverty Truth Commission	To examine progress with the work of the Commission	Portfolio -Health and Social Care Amanda Richardson	Service Performance reporting
Wednesday 19 <sup>th</sup> June 2024	Review of Oldham Community Leisure and the operation of the Leisure Contract	Scrutiny of OCL and their key performance indicators	Portfolio – Culture and Communities Deputy Chief Executive. Neil Consterdine, Assistant Director Youth, Leisure and Communities	Scrutiny of performance as presented in the Annual Report (Moved from March meeting)
	Corporate Health and Safety Policy	To scrutinise the Council's health and safety arrangements	Portfolio – Neighbourhoods Executive Director – Place & Economic Growth Neil Crabtree - Head of Service	Service performance reporting. (Moved from March Meeting)

### PENDING ISSUES

The impact of the proposed health integration on the Council and its future operations.	To be confirmed	Budget and Performance Monitoring.
Employment and Skills – draft action plan	Possibly October or December 2023	Scrutiny of action plan. Jon Bloor – Assistant Director (Economic Growth)

Update on contract monitoring within the Council for a selected operational area	Appropriate Portfolio Holder and Director responsible for the Service.	Issues and scheduling to be determined by the Committee
Update on contract monitoring within the Council for a selected operational area (report on the performance of E-on)	To scrutinise the Council's health and safety arrangements	Scrutiny of the street lighting contract that the Council has with Eon – Director of Environment/Cabinet Member for Neighbourhoods

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KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
FLC-17-23	Report of the Director of Finance – Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3	Director of Finance	18 <sup>th</sup> March 2024	Cabinet
<p>Description:</p> <p>The report provides an update on the Council’s 2023/24 forecast revenue budget position and the financial position of the capital programme as at the period ending 31 December 2023 (Quarter 3)</p> <p>Document(s) to be considered in public or private: Proposed Report Title:</p> <p>Report of the Director of Finance – Revenue Monitor and Capital Investment Programme 2023/24 Quarter 3</p> <p>Background Documents: Appendices – Various</p> <p>Report to be considered in Public</p>				
FLC-19-23	Report of the Director of Finance - Local Taxation and Benefits Discretionary Policies 2024/25	Director of Finance	18 <sup>th</sup> March 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
Page 1208	Description: To confirm the Council's Local Taxation and Benefits Discretionary Policies for 2024/25 Document(s) to be considered in public or private: Proposed Report Title: Local Taxation and Benefits Discretionary Policies 2024/25 Background Documents: Appendices Report to be considered in public			
	FLC-18-23	Report of the Director of Finance – Treasury Management 2023/24 – Quarter 3 Report	Director of Finance	18 <sup>th</sup> March 2024
Description: The Quarter 3 review of Treasury Management activity during the third Quarter of 2023/24. Document(s) to be considered in public or private: Proposed Report Title: Report of the Director of Finance – Treasury Management Review 2023/24 – Quarter 3 Report Background Documents: Appendices Report to be considered in Public				

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
FLC-05-23	Report of the Director of Finance – Debt Recovery Policies	Director of Finance	18 <sup>th</sup> March 2024	Cabinet
<p>Description:</p> <p>To provide clear guidance for Council Officers, local taxpayers, and organisation who use Council services on recovery of monies owed to the Council.</p> <p>Document(s) to be considered in public or private: Proposed Report Title:                      Report of the Director of Finance – Debt Recovery Policies</p> <p>Background Documents: Appendices – Various</p> <p>Report to be considered in Public</p>				
HL-01-23	Corporate Resource to the Housing Crisis	Deputy Chief Executive - Place	18 <sup>th</sup> March 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: A report detailing the Council’s response to the Housing Crisis</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
<p>Page 219 New! ESR-01-24</p>	<p>Acceptance of Brownfield Infrastructure and Land Funding Grant for Oldham Mumps, Princes Gate</p>	<p>Director of Economy</p>	<p>18<sup>th</sup> March 2024</p>	<p>Cabinet</p>
<p>Description: proposals to accept grant funding for works at Oldham Mumps, Princes Gate</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
NEI-04-24	Street Lighting Attachments Policy	Director of Environment	18 <sup>th</sup> March 2024	Cabinet
<p>Description: To ask Cabinet to formulate and agree a Streetlighting attachments policy</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
NEI/02/24	Don't Trash Oldham	Director of Environment	18 <sup>th</sup> March 2024	Cabinet

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**KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024**

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: Proposals to further develop and expand the Don't Trash Oldham initiative</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
FCR-03-24	Contractual Arrangements – Synergy Education Management System Contract Renewal 2024	Deputy Chief Executive	18 <sup>th</sup> March 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
NEI-03-24	Dropped Kerb Policy	Director of Environment	18 <sup>th</sup> March 2024	Cabinet
	<p>Description: a report requesting authority to enter into a call-off contract under a procurement compliant framework agreement in accordance with Contract Procedure Rules to support the ongoing use of Synergy Education Management System for 3 years with the option to extend by a further 2 years.</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>			

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
CHS-02-24	Development of Children’s Residential Homes	Managing Director of Children’s Services	18 <sup>th</sup> March 2024	Cabinet
<p>Description: Proposals to develop Children’s Homes in the Borough</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
CHS-01-24	Capital and Revenue Grants - Childcare Expansion Programme	Director of Children’s Services	18 <sup>th</sup> March 2024	Cabinet

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KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description:</p> <p>This report seeks approval for the allocation and expenditure of the Oldham’s 2024/26 Childcare Expansion Capital and Revenue Grant.</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
<p>Page 2/15</p> <p><b>New!</b></p> <p>HSC-01-24</p>	<p>Procurement of Social Prescribing Service</p>	<p>Director of Adult Social Care</p>	<p>Before 31<sup>st</sup> March 2024</p>	<p>Cabinet Member – Health and Social Care</p>

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description:</p> <p>This report seeks approval for the procurement of social prescribing services (post Covid-19).</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				
<p>EDS-01-24 <b>New!</b></p>	<p>Additionally Resourced Provision</p>	<p>Director of Education, Skills &amp; Early Years</p>	<p>Before 31<sup>st</sup> March 2024</p>	<p>Cabinet Member - Education and Skills</p>

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KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description:</p> <p>To seek approval to fund a number of small projects to enhance the learning spaces for children with SEND and additional needs.</p> <p>Background Documents: Appendices – Various</p> <p>Document(s) to be considered in public or private: public and private? NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information.</p>				

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**Key:**

**New!** - indicates an item that has been added this month.

Notes:

1. The procedure for requesting details of documents listed to be submitted to decision takers for consideration is to contact the Council's Constitutional Services team – [constitutional.services@oldham.gov.uk](mailto:constitutional.services@oldham.gov.uk) or the Contact Officer detailed in the Key Decision Sheet for that item. The contact address for documents is Oldham Council, Civic Centre, West Street, Oldham, OL1 1UH. Other documents relevant to those matters may be submitted to the decision maker.

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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2. Where on a Key Decision Sheet the Decision Taker is Cabinet, the list of its Members is as follows: Councillors Arooj Shah (Leader of the Council), Elaine Taylor, Shaid Mushtaq, Abdul Jabbar MBE, Fida Hussain, Mohon Ali, Barbara Brownridge, Peter Dean and Chris Goodwin.
  
3. Full Key Decision details (including documents to be submitted to the decision maker for consideration, specific contact officer details and notification on if a report is likely to be considered in private) can be found via the online published plan at: <http://committees.oldham.gov.uk/mgListPlans.aspx?RPId=144&RD=0>

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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**Notice of Private Reports (In accordance with Part 2 of the Local Authorities (Executive Arrangements) Meetings and Access to Information) (England) Regulations 2012)**

Oldham Borough Council intends to hold a private meeting (or part thereof) of the Cabinet on Monday, 18<sup>th</sup> March 2024:

Decision to be taken (Agenda Item)

**Decisions proposed to be taken in private at Cabinet on 18<sup>th</sup> March 2024:**

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- a. **Corporate Resource to the Housing Crisis: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Acceptance of Brownfield Infrastructure and Land Funding Grant for Oldham Mumps, Princes Gate: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Street Lighting Attachments Policy: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Don't Trash Oldham: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Contractual Arrangements – Synergy Education Management System Contract Renewal 2024: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Dropped Kerb Policy: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Development of Children’s Residential Homes: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information. Capital and Revenue Grants - Childcare Expansion Programme: rtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest due to the commercial confidentiality of the information**

Reason

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 1 MARCH 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

**Representations**

If you wish to make representations against the intention to hold a private meeting, please send these to Constitutional Services, Level 4, Civic Centre, Oldham, OL1 1UL or email: [constitutional.services@oldham.gov.uk](mailto:constitutional.services@oldham.gov.uk)